

Name:

Date:

Name of Financial Institutions	Client	Joint with Survivorship	Trust	Other
Checking Accounts				
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
Savings Accounts				
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
Money Market Accounts				
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
Cert's of Deposit				
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	

	Client	Joint with Survivorship	Trust	Other
Stocks & Bonds, Brokerage Acc'ts, Mutual Funds				
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
Notes Receivable				
	\$	\$	\$	
	\$	\$	\$	
Non-tax-qualified Annuities				
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
Business Interests / Ltd Partnerships				
	\$	\$	\$	
	\$	\$	\$	

	Client	Joint with Survivorship	Trust	Other
Tax-qualified Retirement Accts.				
IRA	\$	N/A	N/A	
	\$	N/A	N/A	
	\$	N/A	N/A	
	\$	N/A	N/A	
Annuities	\$	N/A	N/A	
	\$	N/A	N/A	
	\$	N/A	N/A	
401(k), 403(b) etc.	\$	N/A	N/A	
	\$	N/A	N/A	
	\$	N/A	N/A	
Real Estate (Tax Assessed Value, note mortgages under Debt)				
Residence	\$	\$	\$	
Second Home	\$	\$	\$	
Life Estate	\$	\$	\$	
Life Estate	\$	\$	\$	
Time Share	\$	\$	\$	
Time Share	\$	\$	\$	
Heir Property	\$	\$	\$	
Heir Property	\$	\$	\$	
Investment/Rental Property	\$	\$	\$	
Investment/Rental Property	\$	\$	\$	
Other	\$	\$	\$	

	Client	Joint with Survivorship	Trust	Other
Personal Property				
Vehicle 1	\$	\$	\$	
Vehicle 2	\$	\$	\$	
Boat	\$	\$	\$	
Trailer	\$	\$	\$	
Other vehicle	\$	\$	\$	
Value of Plots Owned	\$	\$	\$	
Funeral Arrangements	\$	\$	\$	
Pers. Prop. of Unusual Value	\$	\$	\$	
Cash Value of Life Insurance				
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
Other asset not otherwise addressed				
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
TOTAL	\$0.00	\$0.00	\$0.00	

Gross Income per Month	
Social Security	\$
Social Security Disability Income	\$
Supplemental Security Income	\$
Military Retirement	\$
Civil Service Pension	\$
Other Pensions	\$
VA Disability	\$
Rental Income	\$
Alimony	\$
Annuity Income	\$
Other:	\$
Other:	\$
Other:	\$
Total Gross Monthly Income	\$
	\$0.00

Real Property sold over last five years			
Address	Approximate Date	Tax Assessed Value at sale	Gross Sales price
		\$	\$
		\$	\$
		\$	\$

Gifts given over last five years			
	Approximate Date	Approximate Value	Notes
Tithing / Charities		\$	
Family Gifts		\$	
		\$	
		\$	
		\$	
		\$	

Debts Owed	Total Owed	Monthly Payment	Notes
	\$	\$	
	\$	\$	
	\$	\$	

Est. Monthly Medical Expenses	
Medicare Premium	\$
Supplemental Insurance Premium	\$
Medicare Part D Premium	\$
Recurring Prescriptions	\$
Home Health Care	\$
Adult Day Care	\$
Nursing Home	\$
Incontinence Supplies	\$
Long Term Care Insurance	\$
Other	\$
TOTAL	\$

DIRECTIONS TO YORK COUNTY OFFICE

1700 George Washington Memorial Highway, Suite D
York County, VA 23693
(757) 898-0898

From I-64: (East or West), take the Route 17, George Washington Memorial Highway exit North toward Yorktown (258B). After passing through five traffic signals the office complex will be about another 1/4 mile ahead on your right.

From Victory Blvd.: Turn south onto Route 17, George Washington Memorial Highway (toward I-64). At the second traffic signal (Coventry Blvd.) make a U-turn, heading North on Route 17. The office complex will be about 1/4 mile ahead on your right.

From Route 17 - North of Victory Blvd: Proceed south on Route 17. Cross Victory Blvd. and proceed to the second traffic signal (Coventry Blvd.). Make a U-turn, heading North on Route 17. The office complex will be about 1/4 mile ahead on your right.

Landmarks: The office complex sits between the Royal Farms and Speedway gas station/ convenience store. Look for a brick building with green awnings.

DIRECTIONS TO GLOUCESTER OFFICE

Office is Open by Appointment Only

**6558 Main Street, Suite 2
Gloucester Courthouse, VA 23061
(804) 824-9439**

From North of Gloucester: Take George Washington Memorial Hwy / US-17 S toward Gloucester Courthouse. Left turn onto Business 17. Follow Business 17 partially around the courthouse circle, remaining on Business Route 17 (Main Street). 6558 Main St is on the right shortly after you exit the circle. Parking is available behind the building or on the street.

From South of Gloucester: Take George Washington Memorial Hwy / US-17 N toward Gloucester Courthouse. Right turn onto Business 17. Follow Business 17 through downtown. Office will be on your left, just prior to the courthouse circle. Parking is available behind the building or on the street.

Landmarks: We are located in the Morgan Building. The Good Life Kitchen is across the hall.

DIRECTIONS TO McLAWS OFFICE

Office is Open by Appointment Only

**430 McLaws Circle, Suite 100
Williamsburg, VA 23185
(757) 645-4520**

From I-64 East or West: Follow 64 to VA-199 W via EXIT 242A toward Williamsburg/ Jamestown. Once on 199, merge onto US 60 – Pocahontas Trail (toward Williamsburg / Busch Garden). Take the first right onto McLaws Circle. Go about a third of a mile; 430 McLaws Circle is on your left. When you enter the parking lot, look to the end of the parking lot. You will see a building with the name “Leebcor” on the top. Our office has a separate entrance to the right of the main entrance.