

Spouse's Property

Existing Accounts

Proposed Accounts

single	joint	Payable	Revocable	single	joint	Payable	Revocable
name	names	on death	trust	name	names	on death	trust

Bank Accounts [non-retirement]

1							
2							
3							

Brokerage Accounts [non-retirement]

1							
2							
3							

Mutual Funds, Stocks, Bonds, Limited Partnership Interests [non-retirement]

1							
2							
3							

IRAs, Qualified Annuities and 401(k) Accounts

1							
2							

Non-Qualified Annuities

1							
2							
3							

Life Insurance Policies

1							
2							

Real Estate

1							
2							

Cars

1							
2							

Other tangible personal property

1							
2							