



WORKSHEET: CHARTING ASSETS

Please make a copy of this page for yourself and one for your spouse. Together, list all assets owned by either or both of you, including bank and investment accounts, pensions and retirement accounts, real estate, businesses, vehicles, patents, copyrights, royalties, antiques, artwork, collections, and cash-value life insurance. For each asset, indicate in the "Source of Payment" section whether it was purchased using marital or non-marital funds.

Securities and Advisory services offered through LPL Financial, a Registered Investment Advisor, member FINRA/SIPC.

Securities and Advisory services offered through LPL Financial, a Registered Investment Advisor, member FINRA/SIPC. Rebekah Von Berg is an LPL Financial Advisor and founder of Concerto Financial Partners, LLC located at 4783 Farmingdale Dr. suite 245 Colorado Springs, CO 80918. She may only discuss and/or transact business with residents of the following states: AZ, CA, CO, CT, FL, MN, MO, VA.

ConcertoFinancial.com