

Comparison - Assets

Current Case and Version
Sample, Paul, 5/20/2009

Comparison Case and Version
Sample, Martha, 5/20/2009

Financial Assets

Bank Accounts

Description	Value
Checking - First Federal - Joint	2,300
Checking - First Federal - Paul's Account	1,800
Savings - Joint Savings	24,500
Savings - Martha Personal Savings	7,600
	36,200

Bank Accounts

Description	Value
Checking - First Federal - Joint	2,300
Checking - First Federal - Paul's Account	1,800
Savings - Joint Savings	24,500
Savings - Martha Personal Savings	7,600
	36,200

Stocks

Description	Shares	Price/Share	Value
Exxon	1000	71.44	71,440
IBM	100	70.81	7,081
			78,521

Stocks

Description	Shares	Price/Share	Value
Colgate	100	70.81	7,081
Exxon	101	71.44	7,215
IBM	500	124.00	62,000
			76,296

Mutual funds

Description	Shares	Price/Share	Value
American Funds	1000	7.05	7,050
Vanguard Global Equity	300	23.53	7,059
			14,109

Mutual funds

Description	Shares	Price/Share	Value
American Funds	1000	7.05	7,050
Vanguard Global Equity	300	23.53	7,059
			14,109

Total Financial Assets: 128,830

Total Financial Assets: 126,605

Property Assets**Real Property - Homes**

Description	Equity
550 N. Hemlock Lane Port Washington, NY 11050	303,038
	303,038

Real Property - Other

Description	Equity
2345 Lakeview Drive Long Beach, NY 11561	365,000
	365,000

Vehicles

Description	Equity
2005 Honda Civic	3,500
2007 Chevrolet Malibu XS	6,750
2008 Kawasaki Cruiser	13,500
	23,750

Total Property Assets:**783,988****Real Property - Homes**

Description	Equity
550 N. Hemlock Lane Port Washington, NY 11050	303,038
	303,038

Real Property - Other

Description	Equity
2345 Lakeview Drive Long Beach, NY 11561	365,000
	365,000

Vehicles

Description	Equity
1999 Honda Civic	3,500
2005 Chevrolet Malibu XS	6,750
2007 Kawasaki Cruiser	13,500
	23,750

Total Property Assets:**774,288****Miscellaneous Assets****Other Personal Property**

Description	Value
Antique Paintings	86,000
Golf Clubs	500
Heirloom Emerald Ring	5,700
	92,200

Other Personal Property

Description	Value
Antique Paintings	76,000
Golf Clubs	800
Heirloom Emerald Ring	5,700
	82,500

Household Furnishings

Description	Value
Marital Furniture Principal Residence	28,500
Marital Furniture Vacation Home	18,000
	46,500

Household Furnishings

Description	Value
Marital Furniture Principal Residence	22,000
Marital Furniture Vacation Home	21,000
	43,000

Sample, Paul, 5/20/2009

Sample, Martha, 5/20/2009

Life Insurance

Company	Policy amt	Net Value
Traveler's Life Insurance C	250,000	46,114
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		46,114

Life Insurance

Company	Policy amt	Net Value
Traveler's Life Insurance C	250,000	46,114
		<hr/>
		46,114

Total Miscellaneous Assets:

92,614

Total Miscellaneous Assets:

89,114

Total Assets:

1,005,432

Total Assets:

990,007