SYNTERO

244 Front Street
Danville, CA 94526
Phone: 925.905.9050
Fax: 925.905.9051
www.synterogroup.com

CONFIDENTIAL

ESTATE PLANNING QUESTIONNAIRE

BANK, BROKERAGE & OTHER FINANCIAL ACCOUNTS WORKSHEET

Date: ______________________________

CLIENT 1 NAME	
CLIENT 2 NAME	

ABOUT THIS WORKSHEET

This is a supplementary worksheet to the Syntero Group *Estate Planning Questionnaire* . Please list all bank and brokerage accounts that are currently vested in your name, including: checking/savings accounts, mutual funds, stocks, bonds and notes. Please provide the institution name, last four digits of the account number, current estimated value of that asset, and information about how title is vested (owned). For each account, **please provide a copy of the most recent statement.**

#

Type of Asset	☐ Checking Acct. ☐ Bonds or Notes	☐ Savings Acct. ☐ Mutual Fund	
Description (if needed)			
Institution			
Last 4 Digits of Acct. #		Estimated Value	$
Owned by	☐ Client 1 ☐ Client 2	☐ Other:	

#

Type of Asset	☐ Checking Acct. ☐ Bonds or Notes	☐ Savings Acct. ☐ Mutual Fund	
Description (if needed)			
Institution			
Last 4 Digits of Acct. #		Estimated Value	$
Owned By	☐ Client 1 ☐ Client 2	☐ Other:	

#

Type of Asset	☐ Checking Acct. ☐ Bonds or Notes	☐ Savings Acct. ☐ Mutual Fund	
Description (if needed)			
Institution			
Last 4 Digits of Acct. #		Estimated Value	$
Owned By	☐ Client 1 ☐ Client 2	☐ Other:	

If you need additional space, please make as many copies of this page as needed.