

PERSONAL FINANCIAL DATA FORM

**IOWA STATE BANK
TRUST DEPARTMENT
2301 128TH ST
URBANDALE, IOWA 50323
515/246-8240
TOLL FREE - 888/824-0111**

FAMILY INFORMATION

Name _____ Birth Date _____
Spouse _____ Birth Date _____
Address _____ Phone _____

ASSETS (Market Value)

Cash _____
Personal Property _____
Stocks & Bonds _____
Real Estate _____
Retirement Benefits _____
Life Insurance _____
Business Interests _____
Less Debts _____
Net Assets _____

FINANCIAL OBJECTIVES

1. If your spouse and children survive you:

2. If you and children survive your spouse:

3. Children survive you and your spouse:

4. If no descendants survive you and your spouse:

ADVISORS

Attorney _____ Insurance _____
Accountant _____ Other _____