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## **FINANCIAL INFORMATION**

(a) <u>Income</u> . Please list your sources of income, which may include wages, government benefits, dividend from investments, bonuses, income from a trust, income from a pension plan, winnings, and regular gifts.
(b) <u>Deposit Accounts</u> . For each bank account, money market account, safe deposit box, certificate o deposit, brokerage house account, trading account or any other deposit account, please note the account in the space provided below and include a recent account statement.
(c) <u>Retirement Benefits and Annuities</u> . For each pension or profit-sharing plan, Keogh plan, mutual fundlife insurance policy, individual retirement account, stock option plan, annuity contract, employment agreement 401(k) or other arrangement, please note the account in the space provided below and include a recent account statement.

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Stocks, Bonds and Notes. For each publicly traded stock, bond or note, please note each stock, bond on the space provided below and include a recent statement or other document that states the CUST number, ticker symbol (if applicable), the face amount (if applicable), the date of issue and date of maturity (applicable), and the stated rate of interest (if applicable). Please do not list stocks that are owned in or through accounts reported in the previous paragraphs.
(e) <u>Closely Held Businesses</u> . For each private corporation, limited liability company or partnership in which an interest is held, please note each company in the space provided below and include percentage of ownership interest.
(f) <u>Real Estate</u> . For each interest in real estate, please include the following information: the street address a copy of the closing statement and a copy of the deed.
(g) <u>Notes</u> . For all notes or mortgages for which you are the creditor, please include the followin information: the name of the maker; the face amount; the date and date of maturity; the rate of interest; the mount of unpaid interest accrued; a description of the security; and any other information relevant to the fact market value of the note or mortgage (a history of defaults or late payments, the value of the security, or the creditworthiness of the maker).
(h) <u>Cash</u> . Please detail location and amount.
(i) Other Interests. Please list any other interests or obligations.

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