

Step 2 - Take Stock of the Present (continued)

6. Miscellaneous

A. Other financial information

Income	Amount	Other Information
Your current wage income		
Your spouse's wage income		
Your Social Security		
Spouses Social Security		
Business/Farm income		
Custom work income		
Veteran's income		

Person completing this step:

Date completed:

B. Gifts that have been made

Description/Given to?	By You, Spouse, or Joint	Amount	When Given and Location of Tax Returns

Person completing this step:

Date completed:
