Debt Inventory Worksheet

THE NEWMAN GROUP
of Oppenheimer & Co. Inc.

Name:

Date:

Name/Type of Account	Lender	Interest Rate	Monthly Payment	Remaining Balance

The information you provide in this worksheet will be used to review your current financial situation. The more complete and detailed the information you provide, the more valuable the review will be. The questionnaire requests information that we have found to be common to many of our clients, recognizing that all categories do not apply to all clients. The information supplied in response to this questionnaire is protected, privileged, and will be held in the strictest confidence. It will be used only in the formulation of recommendations of investment strategies to address your circumstances. It will not be revealed to anyone outside of the firm. Oppenheimer & Co. Inc. does not give legal or tax advice. However, our Financial Professional will work with clients, their attorneys and tax professionals to ensure all of their needs are met and properly executive.

This report is for illustration purposes only; it is not and should not be construed as a substitute for your Oppenheimer & Co. Inc. account statement or Form 1099 and should not be relied upon for tax reporting purposes.

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