

ESTATE PLANNING LIST

This list will enable you to see what your assets are and will be helpful to you when speaking with an estate planning attorney to determine what estate plan is best for your particular situation.

- Life Insurance**
- Real Estate**
- Automobiles / Vehicles**
- Tangible Personal Property: Jewelry, furniture, art, antiques, etc.**
- Bank Accounts**
- Certificates of Deposit**
- Annuities**
- IRA's**
- 401(k) / 403(B) / Pension Plan / Deferred Comp**
- Investments (Non 401(k) / IRA)**
- Business Interest**
- Future Inheritances**
- Interests in Estates or Trusts**
- Outstanding Liabilities**
- Fiduciaries**

As you review this list and identify the items that are included in your list of assets, you can see that there is a monetary value in each of these categories.



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