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Estate Planning List

This checklist and asset inventory worksheet will enable you to see what your assets are and be helpful to you when speaking to a qualified estate planning attorney to determine what estate plan is best for your particular situation.

Please check the following assets:

- 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



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Asset Inventory Worksheet

Property: List each piece of real property (house and real estate), including address and legal description, and when it was obtained.

Value \$ _____

Value \$ _____

Notes and Cash: List all check accounts, savings accounts, Money Markets, and Certificates of Deposit with bank name, address, account numbers, and balance.

Value \$ _____

Value \$ _____

Value \$ _____

Business Interests: List the name of the business, the type of business (partnership, Scorp, LLC, etc.), and the approximate value.

Value \$ _____

Stocks and Bonds: List all stocks and/or bonds including name of financial institution, address of financial institution, account numbers, shares, and value.

Value \$ _____

Value \$ _____

Miscellaneous: List the total value of each of the following:

Clothing, furniture, jewelry, and personal effects value

\$ _____

\$ _____

\$ _____

Life Insurance, Retirement Plans, IRA's, Pensions value

\$ _____

\$ _____

List each vehicle including year, make, model, VIN No., and value

Value \$ _____

Value \$ _____

As you review this worksheet 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. It would be helpful to bring this worksheet with you when meeting with your estate planning attorney. Please note that this list is only a sampling of assets and is not all inclusive.