

ESTATE PLANNING BASIC ASSET CHECKLIST

Date:

This is a **very basic worksheet** so we can discuss how to fund your trust and what additional info we will need.

NAME(S):  
ADDRESS:  
PHONE:

Total Value of Estate:	\$ _____
Residence	\$ _____
Real Estate (Rentals, etc.)	\$ _____
(Description)	\$ _____
	\$ _____
	\$ _____
	\$ _____
Securities/ Investments	\$ _____
	\$ _____
	\$ _____
Cash accounts	\$ _____
	\$ _____
IRA/ pension	\$ _____
	\$ _____
Notes	\$ _____
Insurance	\$ _____
How owned?	_____
Professional practice	\$ _____
Business interest	\$ _____
Buy/ sell agreement	\$ _____
Expectancy	\$ _____
Other:	\$ _____
Other:	\$ _____

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