

**ASSET ORGANIZATION FOR ESTATE PLANNING**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ASSET | VALUE IN  YOUR NAME | VALUE IN  SPOUSE’S NAME | VALUE IN JOINT NAMES W/ SPOUSE | AMOUNT OF DEBT ON ASSET |
| Real Estate: Homestead |  |  |  |  |
| Real Estate: Investment |  |  |  |  |
| Money Owed to You |  |  |  |  |
| Business |  |  |  |  |
| Death Benefit of Life Insurance |  |  |  |  |
| Annuities |  |  |  |  |
| IRAs and other Retirement Plans |  |  |  |  |
| Brokerage Accounts/ Mutual Funds |  |  |  |  |
| Individually-held Stocks & Bonds |  |  |  |  |
| Checking, Savings, Money Market |  |  |  |  |
| Vehicles, Boats & Planes |  |  |  |  |
| Household Goods |  |  |  |  |
| Other Personal Effects |  |  |  |  |
| Other |  |  |  |  |
| **Totals** |  |  |  |  |

**Please tell us the following information about each property that you own (*if different from your residence*):**

|  |  |  |
| --- | --- | --- |
| **What is the full address?** |  |  |
| **In what county is it located?** |  |  |
| **Name of owner(s):** |  |  |
| **Approximate date/year of purchase:** |  |  |

**YOUR ADVISORS** (In case we need to consult with them)

|  |  |  |  |
| --- | --- | --- | --- |
| Accountant |  | Firm | Phone (**)      -** |
| Financial Advisor |  | Firm | Phone (**)      -** |
| Financial Advisor |  | Firm | Phone (**)      -** |
| Life Insurance Agent |  | Firm | Phone (**)      -** |
| Attorney, if other than us |  | Firm | Phone (**)      -** |