Date:	 	 

Real Property				
How is Title Held?	Estimated Value	Debt, Loan, or Mortgage against property		
Joint Tenancy / Tenants in Common / Community Property with Right of Survivorship / Trust				
Joint Tenancy / Tenants in Common / Community Property with Right of Survivorship / Trust				
Joint Tenancy / Tenants in Common / Community Property with Right of Survivorship / Trust				
Joint Tenancy / Tenants in Common / Community Property with Right of Survivorship / Trust				
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Doto
Date:

Publicly Trades Stock and Bonds/ Brokerage Accounts, Mutual Funds, Savings Bonds				
Name and Location of Institution	Account Number(s)	Who holds Title?	Estimated Value	

Date	:

Bank Accounts, Savings & Loan Accounts, Credit Union Accounts, Etc.				
Name and Location of Account Number(s) Who holds Title? Estimated Institution				

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	Date:

Annuities, IRAs & Retirement Accounts			
Name and Location of Institution	Account / Contract Number(s)	Who is the Beneficiary?	Estimated Value

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	Date:

Business Interests and Promissory Notes				
Contact information	Nature of the Interest	Holder of the Interest	Estimated Value	

Date:

Life Insurance			
Name and Location of Institution	Policy Number(s)	Who is the Beneficiary?	Estimated Value

Date:		-	
Miscellaneous Property (i.e., Loans owed to you or yo	ur Trust, etc.)		
Nature of Property	Title Holder		Estimated Value
Liabilities - Owed by you or your Trust			
Nature of Liability (i.e., personal loan, etc.)	Lender	Estimated Amount Owed	