

Estate Planning Asset Sheet

Note: Include in joint column only joint property between individual # 1 & 2

	Individual #1	Individual # 2	Joint	TOTAL
Cash:				
Bank accounts:				
Certificates of Deposit:				
Stocks, Bonds & Mutual Funds:				
Savings Bonds:				
Real Estate - residence:				
Real Estate - vacation:				
Pension/Profit Sharing:				
IRA's:				
Business value:				
Personal property:				
Life Insurance:				
(Face value)				
Group life insurance:				
(Face value)				
Other joint proeprty:				
(with individuals other than #1 or #2)				
TOTAL ASSETS:				

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Liabilities:				
Mortgages:				
TOTAL LIABILITIES:				
NET ASSETS:				