

Schedule of Assets for an Individual

Name: _____

Date: _____



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The information you provide will be kept confidential. These figures assist with estate planning and tax planning, and help identify which assets will pass according to your Will (probate assets) and which will pass according to contract (non-probate).

1. CHECKING, SAVINGS, MONEY MARKET ACCOUNTS, CDS (list any IRA accounts on the reverse side)

Account Type	Bank Name	Approximate Value	Name(s) on Account	Beneficiaries (if any)
		\$	<input type="checkbox"/> Individual <input type="checkbox"/> Trust Account <input type="checkbox"/> Joint with: _____	<input type="checkbox"/> This account is set up to Pay on Death (POD) to: _____
		\$	<input type="checkbox"/> Individual <input type="checkbox"/> Trust Account <input type="checkbox"/> Joint with: _____	<input type="checkbox"/> This account is set up to Pay on Death (POD) to: _____
		\$	<input type="checkbox"/> Ind. <input type="checkbox"/> Trust <input type="checkbox"/> Joint w/: _____	<input type="checkbox"/> POD to: _____
		\$	<input type="checkbox"/> Ind. <input type="checkbox"/> Trust <input type="checkbox"/> Joint w/: _____	<input type="checkbox"/> POD to: _____
		\$	<input type="checkbox"/> Ind. <input type="checkbox"/> Trust <input type="checkbox"/> Joint w/: _____	<input type="checkbox"/> POD to: _____
	SUBTOTAL	\$		

2. REAL ESTATE

Street Address / Description	Approximate Value	Name(s) on Deed	Beneficiaries (if any)
	\$	<input type="checkbox"/> Individual <input type="checkbox"/> Trust <input type="checkbox"/> Joint w/: _____ (<input type="checkbox"/> Survivorship <input type="checkbox"/> Tenants in Common)	<input type="checkbox"/> This deed is set up to Transfer on Death (TOD) to: _____
	\$	<input type="checkbox"/> Ind. <input type="checkbox"/> Trust <input type="checkbox"/> Joint w/: _____ (<input type="checkbox"/> Survivorship <input type="checkbox"/> Tenants in Common)	<input type="checkbox"/> TOD to: _____
	SUBTOTAL	\$	

3. AUTOMOBILES, BOATS, OTHER ASSETS (e.g. business, major collections, etc.)

Description	Approximate Value	Name(s) on Title	Beneficiaries (if any)
	\$	<input type="checkbox"/> Individual <input type="checkbox"/> Trust <input type="checkbox"/> Joint with: _____	<input type="checkbox"/> This title is set up to Transfer on Death (TOD) to: _____
	\$	<input type="checkbox"/> Ind. <input type="checkbox"/> Trust <input type="checkbox"/> Joint w/: _____	<input type="checkbox"/> TOD to: _____
	\$	<input type="checkbox"/> Ind. <input type="checkbox"/> Trust <input type="checkbox"/> Joint w/: _____	<input type="checkbox"/> TOD to: _____
	SUBTOTAL	\$	

(OVER)

