

**WHAT IS THE VALUE OF YOUR ESTATE?
(WORKSHEET)**

SEE ATTACHED LIST PROPERTY AND ASSETS					TOTALS
RESIDENCE(S) <input type="checkbox"/> SEE ATTACHED LIST					
Location		Mrtg/Lien\$	Approx. Value\$		
OTHER REAL ESTATE INTERESTS <input type="checkbox"/> SEE ATTACHED LIST					
City/Locality	Owned with	Type	Mrtg/Lien\$	Approx. Value\$	
RETIREMENT/PENSIONS/IRAS/KEOUGH/SEP/401K PLANS AND ACCTS.					
Company	Type	Owner	Death Benefic.	Approx. Value\$	
STOCKS/BONDS/MUTUAL FUNDS/PARTNERSHIPS/INVESTMENTS					
Company	Type	Apprx. # shares	Approx. Value\$		
CHECKING/SAVINGS/CDS/CREDIT UNION OR BANK ACCOUNTS/OTHER DEPOSIT ACCOUNTS					
Institution	Owner	Type	Approx. Value\$		
LIFE INSURANCE/ANNUITIES					
Company	Type	On whose life	Death Benefit\$		
MONEY/TRUST DEEDS/PROMISSORY NOTES OWED TO YOU					
Type/Debtor		Orig. Amount \$	Now Owed \$		
POTENTIAL INHERITANCE COMING TO YOU					
Relative		For whom	Approx. Value\$		
VEHICLES/MOTOR HOMES					
Type			Approx. Value\$		
List only unusual value items					
FURNITURE/FURNISHINGS/APPLIANCES/HOUSEHOLD GOODS/JEWELRY/MISC.					
Type			Approx. Value\$		
List only unusual value items					
OTHER PROPERTY					
Type		Mrtg/Lien\$	Approx. Value\$		
			DEBTS	ASSETS	
APPROXIMATE TOTALS			\$	\$	