

APPENDIX D

Asset Listing Form

List your assets and approximate values, as this is information needed by the lawyer but is not always easily remembered. It also is very helpful to your trustee so that nothing is left unclaimed. Some people are uncomfortable revealing this to the lawyer, but remember that anything you say or show to the attorney is confidential.

	Your Asset	Spouse's Asset	Joint Asset
Real Estate			
Home	\$ _____	\$ _____	\$ _____
Vacation Home	\$ _____	\$ _____	\$ _____
Other Real Estate	\$ _____	\$ _____	\$ _____
Vehicles			
Cars	\$ _____	\$ _____	\$ _____
Boats	\$ _____	\$ _____	\$ _____
Motor Home	\$ _____	\$ _____	\$ _____
Other Vehicles/ Equipment	\$ _____	\$ _____	\$ _____

Investments			
IRAs	\$ _____	\$ _____	\$ _____
Money Market	\$ _____	\$ _____	\$ _____
Stocks/Bonds	\$ _____	\$ _____	\$ _____
Other Tax Deferred	\$ _____	\$ _____	\$ _____
Pension/Stock Options	\$ _____	\$ _____	\$ _____
Cash Accounts			
Savings	\$ _____	\$ _____	\$ _____
Average Checking	\$ _____	\$ _____	\$ _____
Gold/Precious Metals	\$ _____	\$ _____	\$ _____
Broker Accounts	\$ _____	\$ _____	\$ _____
Insurance			
Life (face amount)	\$ _____	\$ _____	\$ _____
Annuities	\$ _____	\$ _____	\$ _____
Prepaid Burial	\$ _____	\$ _____	\$ _____

Miscellaneous			
Jewelry, Antiques, Collectables	\$ _____	\$ _____	\$ _____
Receivables	\$ _____	\$ _____	\$ _____
Expected Inheri- tances	\$ _____	\$ _____	\$ _____
Business Interests	\$ _____	\$ _____	\$ _____
Household Goods	\$ _____	\$ _____	\$ _____
Online Accounts	\$ _____	\$ _____	\$ _____
Domain Names, Websites	\$ _____	\$ _____	\$ _____
Patents, Royalties, Copyrights	\$ _____	\$ _____	\$ _____
Other Assets (describe)	\$ _____	\$ _____	\$ _____
TOTALS	\$ _____	\$ _____	\$ _____