

(C)	_____	_____	_____
(D)	_____	_____	_____
(E)	_____	_____	_____
(F)	_____	_____	_____
(G)	_____	_____	_____
(H)	_____	_____	_____
(I)	_____	_____	_____
(J)	_____	_____	_____
(K)	_____	_____	_____
(L)	_____	_____	_____
(M)	_____	_____	_____

The following is meant to give your attorney a good idea of the total value of your estate. Knowing your total worth is important to determine the type of estate plan that will keep your estate tax as low as possible.

5. REAL ESTATE INFORMATION

Description and Location	Market Value	Debt
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____

TOTAL \$ _____

(Total value of real estate = market value less debt)

6. PERSONAL PROPERTY *(Please list approximate current value)*

Automobile(s) \$ _____

Savings and Checking Accounts \$ _____

Retirement Plans \$ _____

Stocks/Bonds \$ _____

Household Furnishings \$ _____

Other Personal Assets \$ _____

7. Death Benefits From Insurance \$ _____

8. Military Service Death Benefits \$ _____

9. Expected Inheritance \$ _____

10. TOTAL VALUE OF ESTATE \$ _____
(Add all of the above, including total real estate value)

11. Executor _____ **Alternate** _____

12. Funeral Arrangements _____

13. BENEFICIARY INFORMATION

BEQUEST

	<u>Dollar Amount or</u>	<u>% of Estate</u>
Names of Person(s) or Charitable Organization(s)		
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____
6. _____	_____	_____
7. _____	_____	_____

- 8. _____
- 9. _____
- 10. _____