

ASSET SUMMARY:

MY ASSETS

JOINT
ASSETS

MY SPOUSE'S
ASSETS

Real Estate:

Real Estate:

Bank Accounts:

Bank Accounts:

Investment Accounts:

Investment Accounts:

Life Insurance (death benefit):

Life Insurance (death benefit):

Retirement / IRA's: (Regular or Roth?)

Retirement / 401k, 403b:

Personal Property:

Other _____:

Other _____:

Other _____:

TOTAL ASSETS:

LIABILITY SUMMARY:

Mortgages:

Other _____:

Other _____:

TOTAL LIABILITIES:

NET ESTATE:
