



## Estate Planning Asset Summary

Please complete this form and return to the address listed above. For optimum accuracy, please type or print clearly. For the columns named "TITLE", please indicate whether property is held by one individual "[initials]", as joint tenants "JT", or as separate property of one spouse "SP [initials]". If necessary please use additional sheets of paper.

I. REAL ESTATE				
<b>A. Please provide copies of any deeds.</b>				
ADDRESS	APPROX. FAIR MARKET VALUE	AMOUNT OWED	TITLE	
	\$	\$		
	\$	\$		
	\$	\$		
II. STOCKS/BONDS/ MUTUAL FUNDS				
NAME OF SECURITY OR BROKERAGE	TITLE OF ACCOUNT	NUMBER OF SHARES (IF APPLICABLE)	CURRENT VALUE	TITLE
			\$	
			\$	
			\$	
			\$	
III. BANK ASSETS (Checking Accts., Savings Accts., CDs)				
NAME OF FINANCIAL INSTITUTION	TITLE OF ACCOUNT	ACCOUNT NUMBER	CURRENT BALANCE	TITLE
			\$	
			\$	
			\$	
			\$	
IV. ANNUITIES/ LIFE INSURANCE				
NAME OF COMPANY AND OWNER	ACCOUNT NUMBER	DESIGNATED BENEFICIARY	FACE AMOUNT	TITLE
			\$	
			\$	
			\$	
V. RETIREMENT ACCOUNTS (IRAs, Keogh, 401ks, 403 (b), 457 Accts.)				
NAME OF INSTITUTION/PLAN AND OWNER	ACCOUNT NUMBER	DESIGNATED BENEFICIARY	FACE AMOUNT	TITLE
			\$	
			\$	
			\$	

