

Client: \_\_\_\_\_

Date: \_\_\_\_\_

**ASSET INVENTORY**  
Estimated Current Value

Asset	#	Type	Location	Ownership	Approx. Value	Beneficiary
Real Estate					\$	
Mortgage					\$	
Real Estate					\$	
Mortgage					\$	
Real Estate					\$	
Mortgage					\$	
Cash Accounts					\$	
					\$	
					\$	
					\$	
Investments					\$	
					\$	
					\$	
					\$	
Retirement Benefits					\$	
					\$	
Life Insurance Policies					\$	
					\$	
Partnerships					\$	
					\$	
Closely Held Business Interests					\$	
					\$	
Tangible Personal Property					\$	
					\$	
					\$	
					\$	

*If you need additional spaces, please continue on a separate page.*