AmeriEstate
Legal Plan, Inc.

No matter what your situation, your first step toward getting your estate plan started is to assemble key pieces of information about your personal circumstances, assets, and debts.

This worksheet will help you:

- Create a consolidated view of all the important details about your estate.
- Make things much easier for those who will be tasked wrth handling your affairs someday.
- Clarify your thinking about how you want things handled after you're gone.
- Give your estate planning attorney a head start on assessing your situation and preparing your plan.

Things to keep in mind:

- Try to complete as much of the inventory as possible. If necessary, you can come back and complete any missing information tater.
- If you're completing this inventory as a couple, and you both have significant separate property, it may be simpler to prepare two inventories using a photocopy of this worksheet.
- If there's not enough space on the inventory to list all your assets, just attach additional sheets as necessary.
- Keep a copy of this inventory in a safe place and tell someone you trust where to find it.

Asset Inventory

Bank Accounts

Bank Accounts	Titling	Account No. and Type	Beneficiary	Fair Market Value
			Total Bank Accounts	

Brokerage Accounts

Brokerage Firm Contact Info.	Titling	Account No.	Beneficiary	Fair Market Value
			Total Brokerage Accounts	

Securities in Certificate Form

Name of Stock, Bond, etc.	Titling	CUSIP No.	Number of Shares	Fair Market Value
			Total Securities in Certificate Form	

Individual Retirement Accounts

Investment Firm Contact Info.	Type and Account No.	Account Owner	Beneficiary	Fair Market Value
			Total Individual Retirement Accounts	

Digital Assets

Name of accounts (Yahoo, Gmail, iTunes, iCloud, Bill Pay, Medical Records etc.)	User ID	Password
	Total Digital Asset Accounts	

Employer-Sponsored Retirement Plans and Retirement Benefits

Type	Employer Plan Contact Info.	Account No.	Participant	Beneficiary	Value
Employer- Sponsored Plans					
Employer- Sponsored Plans					
Employee Stock Option					
Deferred Compensation					
Pension/Profit-Sharing					
Veterans/Govt. Benefits					
				Total Employer - Sponsored Retirement Plans and Retirement Benefits	

Health Savings Account

Type	Employer Plan Contact Info.	Account No.	Participant	Beneficiary	Value

Annuities / Pensions

Type	Employer Plan Contact Info.	Account No.	Participant	Beneficiary	Value

Real Estate

Type of Property and Location	Titling	Fair Market Value	Mortgage Amount	Value *(Net of Mortgage)*
			Total Real Estate	

Safe Deposit Box

Bank Contact Info.	Box No.	Contents	Executor	Location of Key

Personal Property

Type	Titling	Description	Fair Market Value
Auto			
Auto			
Home Furnishings			
Collectibles			
Jewelry			
Other			
		Total Personal Property	

Insurance

Insurance Firm Contact Info.	Policy No./Type	Policy Owner	Beneficiary	loans on Policy	Net (of Loans) Face Amount
Life					
Medical					
Disability					
Homeowners/Renters					
Auto					
				Total Insurance: Net Face Amount	

Unsecured Debts

Lender Contact Info.	Type	Balance Outstanding
	Total Unsecured Debts	

Debt Owed to You

Borrower	Contact Info.	Notes	Balance Outstanding
		Total Debt Owed to You	

Business Interests

Business Contact Info.	Titling	Ownership%	Entity Type	Fair Market Value

Total Oebt Owed to You	