Asset Accumulation Worksheet

The following worksheet may be helpful in determining the value of your net estate for estate tax purposes. In addition, when designing you plan, it is important to designate how each asset or account is titled (e.g. Joint Tenants with Rights of Survivorship, etc.)

Financial Information

Assets	Value	Titled
		(Self/Spouse/Joint)
Home	\$	
Other Real Estate	\$	
	\$	
	\$	
Business Interests	\$	
	\$	
	\$	
Checking Accounts	\$	
	\$	
	\$	
Savings Accounts	\$	
	\$	
	\$	
Certificates of Deposit (CDs)	\$	
	\$	
	\$	

(continued...)

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Stocks, Bonds, Mutual Funds	\$	
	\$	
	\$	
	'	
IRAs and Retirement Plans	\$	
	\$	
	\$	
Annuities	\$	
	\$	
	\$	
Life Insurance (Face Value)	\$	
	\$	
	Ψ	
Collectibles (heirlooms, etc.)	\$	
	\$	
	\$	
Personal Property	\$	
(estimate replacement value of furnishing	1	
Total Asset Value	\$	
DEBTS		
Mortgage	\$	
Personal Loans	\$	
Other Debts	\$	
Total Debt Owed	\$	
Total Asset Value - Total Del	ot = Net E	state Value
Income \$_		
\$_		
\$_		