

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.)

Assets	Financial Information	
	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) \$ _____
\$ _____

Collectibles (heirlooms, etc.) \$ _____
\$ _____
\$ _____

Personal Property \$ _____
(estimate replacement value of furnishings, car, clothes)

Total Asset Value \$ _____

DEBTS

Mortgage \$ _____

Personal Loans \$ _____

Other Debts \$ _____

Total Debt Owed \$ _____

Total Asset Value - Total Debt = _____ Net Estate Value