

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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