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...)

NANCY L. CHOATE Attorney At Law The Law Office of Nancy L. Choate P.C. 403 N. Parkway, Suite 201 Jackson, TN 38305 (731) 661-0665

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