

Assets & Liabilities

Real Property:

Description of Property	Fair Market Value at DOD	Encumbrance Amount

Vehicles (automobiles, boats, motorcycles, etc.):

Description of Property	Fair Market Value at DOD	Encumbrance Amount

Cash Accounts

(Checking & Savings Accounts, Brokerage Accounts, Certificates of Deposits)

Financial Institution	Account Number	Date of Death Value

Stocks and Bonds

Description of Security	# of Shares	Date of Death Value

Retirement Accounts

(401k, IRA, 403b, Keogh, SIMPLE, SEP)

Financial Institution	Date of Death Value	Beneficiary

Life Insurance & Annuities

Name of Insurer/Annuity Provider	Name of Owner	Amount of Death Benefit	Name of Beneficiary

Other Monetary Assets

(Contracts, Business Interests, Accounts Receivable)

Description	Date of Death Value

Transfers Made within Three years of Date of Death

(This includes substantial gifts, or any transfer made without consideration, i.e. gift of real estate or sale of property for less than fair market value. This also includes property transferred to a Trust)

Description of Asset	Value at Time of Transfer	Date of Death Value

List of Heirs

Heirs should be listed in order of priority under the will. Only the surviving spouse, children, parents and siblings of the deceased are legally entitled to notice of any probate proceeding. Other individuals not included in the will, for example nieces, nephews, etc., do not need to be included in this list.

Heir # _____
Name _____
Address: _____
City/State: _____
Work Phone: _____
Home Phone: _____
SSN: _____
DOB: _____
Relationship
to Decedent: _____

Heir # _____
Name _____
Address: _____
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