



Real Estate – Primary Residence, Rental, Condo, Cabin, Land, etc.

Address	Asset Type	Owner(s)	Value	Date Recorded

Titled Property – Cars, Boats, Trailers, Motorcycles, ATV's, etc.

Year	Make	Model	Owner(s)	Value

Bank Accounts – Checking, Savings, CD, Money Market, etc.

Institution	Account Type	Account Owner(s)	Balance	Beneficiary

Investment Accounts – IRA, 401k, 403b, 457, Annuities, Stocks, Bonds, Mutual Funds, etc.

Institution	Account Type	Account Owner(s)	Balance	Beneficiary



