Personal Asset Statement

Your Name: ______________________________

Date of Birth: ____________________ Marital Status: ____________________

Beneficiaries: (first/last name and relation)

What is your top Legacy Priority?

<u>Real Property (Houses, apartments, land, etc.)</u>

Legal Address: ______________________________

Estimated Value: ____________________ Amount Owed: ____________________

Description: ______________________________

<u>IRAs / Roth IRAs</u>

Custodian: ______________________________

Approx. Value: ______________________________

Beneficiary(s): ______________________________

<u>Employer Retirement Plans (401k, Simple IRAs, Profit sharing)</u>

Custodian: ______________________________

Approx. Value: ______________________________

Beneficiary(s): ______________________________

<u>College Accounts / 529 Plans</u>

Custodian: ______________________________

Approx. Value: ______________________________

For the Benefit Of: ______________________________

<u>Brokerage Account(s)</u>

Custodian: ______________________________

Approx. Value: ______________________________

Account Owner: ______________________________

Life Insurance

Life Insurance Company: ____

Death Benefit Amount: ____

Cash Value: ____

Beneficiary(s) : ____

Healthcare Savings Account(s) (HSA)

Custodian: ____

Approx. Value: ____

For the Benefit of: ____

Personal property (cars, motorcycles, RV, Boats, jewelry, collectibles, metals, etc.)

Asset(s): ____

Estimated Value: ____

Amount Owed: ____

Description: ____

Business Interests (LLC, S-Corp, C-Corp, Sole-proprietorship, etc.)

Company Name: ____

Estimated Value: ____

Amount Owed: ____

Description: ____