

ESTATE NET WORTH STATEMENT

As of

Your name:

Date of birth

Spouse name:

Date of birth

Ownership (\$)

	You	Spouse	Joint	Family Total
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Assets

Cash and cash equivalents:

Check and savings account

Other

Personal and household property:

Automobiles

Furniture

Jewelry

Personal effects

Art

Coin collections

Other

Real estate (estimated current market value)

Residence(s)

Other properties

Investments (estimated current market value)

Individual stocks

Individual bonds

Personal mutual funds

Other investments

Retirement plans

Equity interest in a business

Life insurance (face amount)

Personal

Employer group

Total assets

Liabilities

Short term liabilities

Credit cards

Long term liabilities

Mortgage(s)

Automobile loan(s)

Other loans

Miscellaneous liabilities

Unpaid taxes

Estimated funeral and administrative expenses

Total liabilities

Estate net worth (total assets less total liabilities)