

Property Worksheet

Property

Name of Any Existing Beneficiary

Real Estate *[list each piece of real estate by address]*

_____	_____
_____	_____

Cash and Other Liquid Assets

cash

_____	_____
_____	_____

checking accounts

_____	_____
_____	_____

savings and money market accounts

_____	_____
_____	_____

certificates of deposit

_____	_____
_____	_____

precious metals

_____	_____
_____	_____

Securities (not in retirement accounts)

mutual funds

_____	_____
_____	_____

listed and unlisted stocks

government, corporate, and municipal bonds

annuities

Retirement Plan Assets (IRAs, Keoghs, Roth IRAs, 401(k) and 403(b) plans)

Vehicles

automobiles, trucks, and recreational vehicles

planes, boats, and other vehicles

Other Personal Property

household goods

valuable clothing, jewelry, and furs

collectibles, including artworks and antiques

tools and equipment

livestock or other valuable animals

money owed you (personal loans, etc.)

death benefits

life insurance (other than term insurance)

miscellaneous (any personal property not listed above)

Business Personal Property

business ownerships (partnerships, sole proprietorships, limited partnerships, limited liability companies, corporations)

intellectual property (domain names, patents, copyrights, and trademarks—including the right to receive royalties)

miscellaneous receivables (mortgages, deeds of trust, or promissory notes held by you;
any rents due from income property owned by you; and payments due for professional or
personal services or property sold by you that have not been fully paid by the purchaser)
