

STEP 1 – Property Inventory

My name is _____, and my address is _____, who is completing this worksheet for planning purposes only with information about my property and who will be the beneficiary of the property to be written in my Will.

I. Real Property (house, land, etc.), how much I own, and who is the intended beneficiary:

	Property Type	Description	Ownership	Intended Beneficiary
Ex.	<i>House</i>	<i>135 Shady Pines Candlewood TX 74562</i>	<i>100%</i>	<i>Goes to Robert</i>
1.				
2.				
3.				
4.				

Financial Accounts (checking, savings brokerage, etc.) and who is the intended beneficiary:

	Account Type	Institution	Ownership	Intended Beneficiary
Ex.	<i>Checking</i>	<i>Bank of Montrose, Account # 987654321</i>	<i>100%</i>	<i>Goes to Beverly</i>
1.				
2.				
3.				
4.				

Personal Property (cars, jewelry, etc.) and who is the intended beneficiary:

	Description	Intended Beneficiary
Ex.	<i>2022 Toyota Tundra</i>	<i>Goes to Joan</i>
1.		
2.		
3.		
4.		

_____ I want to leave a list on a separate document for smaller personal items.