

Property Questionnaire

What Are Your Assets?

Cash and Bank Accounts

Individual accounts can be left by will; joint tenancy and payable-on-death accounts cannot.

Checking Account \$ _____

Bank _____

Account number _____

Name(s) on account _____

Checking Account \$ _____

Bank _____

Account number _____

Name(s) on account _____

Savings Account \$ _____

Bank _____

Account number _____

Name(s) on account _____

Savings Account \$ _____

Bank _____

Account number _____

Name(s) on account _____

Certificate of Deposit \$ _____

Held by _____

Expiration date _____

Name(s) on account _____

Other Account \$ _____

Bank _____

Account number _____

Name(s) on account _____

Total Cash and Bank Accounts (A) \$ _____

Life Insurance and Annuity Contracts

Life insurance benefits cannot be left by will.

Ordinary Life \$ _____
Company _____
Policy number _____
Beneficiary _____
Address _____

Ordinary Life \$ _____
Company _____
Policy number _____
Beneficiary _____
Address _____

Endowment \$ _____
Company _____
Policy number _____
Beneficiary _____
Address _____

Term Life \$ _____
Company _____
Policy number _____
Beneficiary _____
Address _____

Term Life \$ _____
Company _____
Policy number _____
Beneficiary _____
Address _____

Annuity Contract \$ _____
Company _____
Policy number _____
Beneficiary _____
Address _____

Total Insurance and Annuity Contracts (B) \$ _____

Accounts and Notes Receivable

Debts payable to you may be left by will.

Accounts Receivable \$ _____
Due from _____
Address _____

Accounts Receivable \$ _____
Due from _____
Address _____

Accounts Receivable \$ _____
Due from _____
Address _____

Notes Receivable \$ _____
Due from _____
Address _____

Notes Receivable \$ _____
Due from _____
Address _____

Notes Receivable \$ _____
Due from _____
Address _____

Other Debts \$ _____
Due from _____
Address _____

Other Debts \$ _____
Due from _____
Address _____

Other Debts \$ _____
Due from _____
Address _____

Other Debts \$ _____
Due from _____
Address _____

Total Accounts and Notes Receivable (C) \$ _____

Stocks and Mutual Funds

Ownership of individually-held stock and mutual funds may be left by will.

Company _____
CUSIP or certificate number _____
Number and type of shares _____
Value \$ _____

Company _____
CUSIP or certificate number _____
Number and type of shares _____
Value \$ _____

Company _____
CUSIP or certificate number _____
Number and type of shares _____
Value \$ _____

Company _____
CUSIP or certificate number _____
Number and type of shares _____
Value \$ _____

Company _____
CUSIP or certificate number _____
Number and type of shares _____
Value \$ _____

Company _____
CUSIP or certificate number _____
Number and type of shares _____
Value \$ _____

Company _____
CUSIP or certificate number _____
Number and type of shares _____
Value \$ _____

Company _____
CUSIP or certificate number _____
Number and type of shares _____
Value \$ _____

Total Stocks and Mutual Funds (D) \$ _____

Bonds and Mutual Bond Funds

Ownership of individually-held bonds and mutual bond funds may be left by will.

Company _____
CUSIP or certificate number _____
Number and type of shares _____
Value \$ _____

Company _____
CUSIP or certificate number _____
Number and type of shares _____
Value \$ _____

Company _____
CUSIP or certificate number _____
Number and type of shares _____
Value \$ _____

Company _____
CUSIP or certificate number _____
Number and type of shares _____
Value \$ _____

Company _____
CUSIP or certificate number _____
Number and type of shares _____
Value \$ _____

Company _____
CUSIP or certificate number _____
Number and type of shares _____
Value \$ _____

Company _____
CUSIP or certificate number _____
Number and type of shares _____
Value \$ _____

Company _____
CUSIP or certificate number _____
Number and type of shares _____
Value \$ _____

Total Bonds and Mutual Bond Funds (E) \$ _____

Business Interests

Ownership of business interests may generally be left by will.

Individual Proprietorship

Name _____
Location _____
Type of business _____
Your net value \$ _____

Individual Proprietorship

Name _____
Location _____
Type of business _____
Your net value \$ _____

Interest in Partnership

Name _____
Location _____
Type of business _____
Gross value \$ _____
Percentage interest (enter as decimal) _____
Your net value \$ _____

Interest in Partnership

Name _____
Location _____
Type of business _____
Gross value \$ _____
Percentage interest (enter as decimal) _____
Your net value \$ _____

Closely-held Corporation Interest

Name _____
Location _____
Type of business _____
Gross value \$ _____
Percentage of shares held (enter as decimal) _____
Your net value \$ _____

Total Business Interests (F) \$ _____

Real Estate

Property owned individually or as tenants-in-common may be left by will. Property held in joint tenancy or tenancy-by-entirety may not.

Personal Residence

Location _____

Value \$ _____

How is property held (joint tenants, tenancy-in-common, etc.)? _____

What is your percent? (Enter as decimal) _____

Value of your share \$ _____

Vacation Home

Location _____

Value \$ _____

How is property held (joint tenants, tenancy-in-common, etc.)? _____

What is your percent? (Enter as decimal) _____

Value of your share \$ _____

Vacant Land

Location _____

Value \$ _____

How is property held (joint tenants, tenancy-in-common, etc.)? _____

What is your percent? (Enter as decimal) _____

Value of your share \$ _____

Income Property

Location _____

Value \$ _____

How is property held (joint tenants, tenancy-in-common, etc.)? _____

What is your percent? (Enter as decimal) _____

Value of your share \$ _____

Other Property

Location _____

Value \$ _____

How is property held (joint tenants, tenancy-in-common, etc.)? _____

What is your percent? (Enter as decimal) _____

Value of your share \$ _____

Total Real Estate (G) \$ _____

Personal Property

Personal property owned individually or as a tenant-in-common may be left by will.

Car \$ _____
Description _____

Car \$ _____
Description _____

Boat \$ _____
Description _____

Other Vehicle \$ _____
Description _____

Furniture \$ _____
Description _____

Furniture \$ _____
Description _____

Furniture \$ _____
Description _____

Appliance \$ _____
Description _____

Jewelry and Furs \$ _____
Description _____

Music System \$ _____
Description _____

Artwork \$ _____
Description _____

Other \$ _____
Description _____

Other \$ _____
Description _____

Total Personal Property (H) \$ _____

Miscellaneous Assets

Royalties \$ _____
Description _____

Royalties \$ _____
Description _____

Patents \$ _____
Description _____

Copyrights \$ _____
Description _____

Heirlooms \$ _____
Description _____

Heirlooms \$ _____
Description _____

Heirlooms \$ _____
Description _____

Heirlooms \$ _____
Description _____

Heirlooms \$ _____
Description _____

Other \$ _____
Description _____

Other \$ _____
Description _____

Other \$ _____
Description _____

Other \$ _____
Description _____

Other \$ _____
Description _____

Total Miscellaneous Assets (1) \$ _____

Employee Benefit and Pension/Profit-sharing Plans

Retirement benefits cannot be left by will.

Company _____
Plan type _____
Net value \$ _____

Company _____
Plan type _____
Net value \$ _____

Company _____
Plan type _____
Net value \$ _____

Company _____
Plan type _____
Net value \$ _____

Company _____
Plan type _____
Net value \$ _____

Total Employee Benefit and Pension/Profit-sharing Plans (J) \$ _____

Total Assets

Insert totals from previous pages.

Cash and Bank Accounts Total (A) \$ _____

Insurance and Annuity Contracts Total (B) \$ _____

Accounts and Notes Receivable Total (C) \$ _____

Stocks and Mutual Funds Total (D) \$ _____

Bonds and Mutual Fund Bonds Total (E) \$ _____

Business Interests Total (F) \$ _____

Real Estate Total (G) \$ _____

Personal Property Total (H) \$ _____

Miscellaneous Assets Total (I) \$ _____

Employee Benefit and Pension/Profit-sharing Plans Total (J) \$ _____

Total Assets (1) \$ _____

What Are Your Liabilities?

Notes and Loans Payable

Payable to _____
Address _____
Term _____
Interest rate _____ %
Amount due \$ _____

Payable to _____
Address _____
Term _____
Interest rate _____ %
Amount due \$ _____

Payable to _____
Address _____
Term _____
Interest rate _____ %
Amount due \$ _____

Total Notes and Loans Payable (K) \$ _____

Accounts Payable

Payable to _____
Address _____
Term _____
Interest rate _____ %
Amount due \$ _____

Payable to _____
Address _____
Term _____
Interest rate _____ %
Amount due \$ _____

Payable to _____
Address _____
Term _____
Interest rate _____ %
Amount due \$ _____

Total Accounts Payable (L) \$ _____

Mortgages Payable

Property Location _____
Payable to _____
Address _____
Term _____
Interest rate _____ %
Amount due \$ _____

Property Location _____
Payable to _____
Address _____
Term _____
Interest rate _____ %
Amount due \$ _____

Property Location _____
Payable to _____
Address _____
Term _____
Interest rate _____ %
Amount due \$ _____

Property Location _____
Payable to _____
Address _____
Term _____
Interest rate _____ %
Amount due \$ _____

Total Mortgages Payable (M) \$ _____

Taxes Payable

Federal Income Taxes \$ _____
State Income Taxes \$ _____
Personal Property Taxes \$ _____
Real Estate Taxes \$ _____
Payroll Taxes \$ _____
Other Taxes \$ _____
Other Taxes \$ _____
Other Taxes \$ _____

Total Taxes Payable (N) \$ _____

Credit Card Accounts Payable

Credit Card Company _____
Credit card account number _____
Address _____
Interest rate _____ %
Amount due \$ _____

Credit Card Company _____
Credit card account number _____
Address _____
Interest rate _____ %
Amount due \$ _____

Credit Card Company _____
Credit card account number _____
Address _____
Interest rate _____ %
Amount due \$ _____

Credit Card Company _____
Credit card account number _____
Address _____
Interest rate _____ %
Amount due \$ _____

Credit Card Company _____
Credit card account number _____
Address _____
Interest rate _____ %
Amount due \$ _____

Credit Card Company _____
Credit card account number _____
Address _____
Interest rate _____ %
Amount due \$ _____

Credit Card Company _____
Credit card account number _____
Address _____
Interest rate _____ %
Amount due \$ _____

Total Credit Card Accounts Payable (O) \$ _____

Miscellaneous Liabilities Payable

To Whom Due _____
Address _____
Term _____
Interest rate _____ %
Amount due \$ _____

To Whom Due _____
Address _____
Term _____
Interest rate _____ %
Amount due \$ _____

To Whom Due _____
Address _____
Term _____
Interest rate _____ %
Amount due \$ _____

To Whom Due _____
Address _____
Term _____
Interest rate _____ %
Amount due \$ _____

To Whom Due _____
Address _____
Term _____
Interest rate _____ %
Amount due \$ _____

To Whom Due _____
Address _____
Term _____
Interest rate _____ %
Amount due \$ _____

To Whom Due _____
Address _____
Term _____
Interest rate _____ %
Amount due \$ _____

Total Miscellaneous Liabilities Payable (P) \$ _____

Total Liabilities

Insert totals from previous pages.

Notes and Loans Payable Total	(K)	\$	_____
Accounts Payable Total	(L)	\$	_____
Mortgages Payable Total	(M)	\$	_____
Taxes Payable Total	(N)	\$	_____
Credit Card Accounts Payable Total	(O)	\$	_____
Miscellaneous Liabilities Payable Total	(P)	\$	_____
<i>Total Liabilities</i>	(2)	\$	_____

Net Worth Of Your Estate

<i>Total Assets</i>	(1)	\$	_____
Minus (-) <i>Total Liabilities</i>	(2)	\$	_____
Equals (=) Your Total Net Worth		\$	_____