

Law Firm of Michael W. Porter

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ASSET ORGANIZER

Please complete this confidential asset organizer to furnish information which will be used at your initial conference and in the preparation of your estate planning documents. Thorough answers will result in a more accurate estate plan. This organizer should be completed in addition to an Estate Planning Questionnaire
THIS ORGANIZER WILL ASSIST YOUR ATTORNEY IN MAKING RECOMMENDATIONS FOR YOU TO AVOID PROBATE, AND THE DELAYS, FEES AND COSTS OF PROBATE.

Contact Information

Your Full Name: _____ Date completed: _____
Spouse's Full Name: _____ Phone: (____) _____
Your CPA or Accountant's Name: _____
Address: _____
Phone: (____) _____ Email Address: _____
Your Financial Advisor's Name: _____
Address: _____
Phone: (____) _____ Email Address: _____

Asset Information

1. **Accounts:** Please list details of your accounts held at financial institutions and investment firms. (Bring copies of statements if you are uncertain of the details):

A. Financial institution name: _____
Financial institution address: _____
Names ("title") on account: _____
Beneficiary on account (if any): _____
Type of account: Checking Savings Money market Investment
Value of account: \$ _____ Date value determined: _____

B. Financial institution name: _____
Financial institution address: _____
Names ("title") on account: _____
Beneficiary on account (if any): _____
Type of account: Checking Savings Money market Investment
Value of account: \$ _____ Date value determined: _____

C. Financial institution name: _____
Financial institution address: _____
Names ("title") on account: _____
Beneficiary on account (if any): _____
Type of account: Checking Savings Money market Investment
Value of account: \$ _____ Date value determined: _____

(Continue on a separate page if necessary)



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Asset Information continued

2. Do you lease any **Safe Deposit Boxes**? Yes No

A. Location: _____ Box #: _____
Signor(s) on box: _____

B. Location: _____ Box #: _____
Signor(s) on box: _____

3. **Real Estate:** Yes No

A. Type of real estate: Home Condominium Vacant lot Rental
Address: _____
Names of grantees on deed ("title"): _____
Value: \$ _____ Date value determined: _____

B. Type of real estate: Home Condominium Vacant Lot Rental
Address: _____
Names on deed ("title"): _____
Value: \$ _____ Date value determined: _____

(Continue on a separate page if necessary)

Do you own any real estate in another state or country? Yes No

If so, where? _____

Please bring copies of deeds to all real estate in which you own an interest to your appointment.

4. **Life Insurance Policies and/or Annuities:** Yes No

A. Name of owner: _____ Policy #: _____
Name of company: _____
Name of beneficiaries: _____
Alternate/Contingent beneficiaries (if any): _____
Cash Value: \$ _____ Date value determined: _____ Death benefit: \$ _____

B. Name of owner: _____ Policy #: _____
Name of company: _____
Name of beneficiaries: _____
Alternate/Contingent beneficiaries (if any): _____
Cash value: \$ _____ Date value determined: _____ Death benefit: \$ _____

C. Name of owner: _____ Policy #: _____
Name of company: _____
Name of beneficiaries: _____
Alternate/Contingent beneficiaries (if any): _____
Cash value: \$ _____ Date value determined: _____ Death benefit: \$ _____

(Continue on a separate page if necessary)



Asset Information continued

5. **Stocks and/or Bonds in certificate form:** Yes No

Name of owner: _____ Certificate #: _____

Name of company: _____

Cash value: \$ _____ Date value determined: _____ Issue date: _____

(Continue on a separate page if necessary)

6. **Automobiles** that you own (do not list leased vehicles):

A. Year, make & model: _____ VIN# _____

Names on title: _____

B. Year, make & model: _____ VIN# _____

Names on title: _____

C. Year, make & model: _____ VIN# _____

Names on title: _____

7. **Cryptocurrency:** (Bitcoin; Ethereum; Dogecoin; zCash; NFTs; etc.) Yes No
Details: (digital wallets & private keys, etc.) _____

8. **OTHER ASSETS:** (list on separate sheet & include assets titled jointly with another person, or otherwise)

Miscellaneous Items

1. **Have you made any gifts of \$16,000.00 or more to one person during one calendar year?**

Name of recipient: _____ Amount of gifts: _____
Date of gift: _____ Did you file a gift tax return? Yes No

Name of recipient: _____ Amount of gifts: _____
Date of gift: _____ Did you file a gift tax return? Yes No

Name of recipient: _____ Amount of gifts: _____
Date of gift: _____ Did you file a gift tax return? Yes No

Name of recipient: _____ Amount of gifts: _____
Date of gift: _____ Did you file a gift tax return? Yes No

(Continue on a separate page if necessary)

2. **Do you have any pensions?** Yes No

A. Recipient's name: _____ Name of company: _____
Cash value: \$ _____ Amount paid per month: \$ _____
Death beneficiary: _____

B. Recipient's name: _____ Name of company: _____
Cash value: \$ _____ Amount paid per month: \$ _____
Death beneficiary: _____

C. Recipient's name: _____ Name of company: _____
Cash value: \$ _____ Amount paid per month: \$ _____
Death beneficiary: _____



Miscellaneous Items continued

3. Are you the beneficiary of any trust? Yes No

Name of trust: _____
Date of trust: _____ Trust value: \$ _____

Name of trust: _____
Date of trust: _____ Trust value: \$ _____

4. Do you have any debts which are secured by any assets (e.g., real estate mortgage, automobile loans, etc.)? Yes No

A. Name & address of lender: _____
What asset is held as security: _____
Balance owed: \$ _____ Credit life insurance? Yes No

B. Name & address of lender: _____
What asset is held as security: _____
Balance owed: \$ _____ Credit life insurance? Yes No

C. Name & address of lender: _____
What asset is held as security: _____
Balance owed: \$ _____ Credit life insurance? Yes No

5. What "Digital Assets" do you own? ("Digital assets" include files stored on digital devices, including but not limited to, desktops, laptops, tablets, peripherals, storage devices, mobile telephones, smartphones, and any similar digital device. The term "digital assets" also includes but is not limited to emails received, email accounts, digital music, digital photographs, digital videos, software licenses, social network accounts, file sharing accounts, financial accounts, domain registrations, DNS service accounts, web hosting accounts, tax preparation service accounts, online stores, affiliate programs, other online accounts and similar digital items.) List account names, account numbers, Logins, etc, for your digital assets that have value. Do not list any passwords on this form.

Multiple horizontal lines for listing digital assets.

6. Does the total value of your assets exceed \$12,060,000.00? Yes No
(Estate tax planning may also be necessary for estates exceeding \$12,060,000.00)

This confidential Asset Organizer will be used to assist us during your appointment and in the preparation of your estate planning documents. It has no legal effect as to the disposition of your assets after your death or incapacity. If you have any questions in completing this form, please do not hesitate to contact us.

Date: _____

Your signature: _____

Your spouse's signature: _____



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