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CONFIDENTIAL ASSET INVENTORY WORKSHEET

Date Completed: _____

Property:

List each piece of real property (residential home, commercial property, land, or other real estate), including address and county of its location, approximate date obtained, and any joint tenants, if applicable.

Value \$ _____

Value \$ _____

Value \$ _____

Value \$ _____

Notes and Cash

List all check accounts, savings accounts, money markets, and certificates of deposit with bank name, address, account numbers, and balance.

Value \$ _____

Value \$ _____

Value \$ _____

Value \$ _____

Business Interests

List the name of the business, the type of business (partnership, S-corp, LLC, etc.), and the approximate value.

Value \$ _____

Stocks and Bonds

List all stocks and/or bonds including name of financial institution, address of financial institution, account numbers, shares, and value.

Value \$ _____

Value \$ _____

Miscellaneous

List the total value of each of the following: Clothing, furniture, jewelry, and personal effects value.

\$ _____

\$ _____

\$ _____

Life Insurance, Retirement Plans, IRA's, Pensions value

Value \$ _____

Value \$ _____

Value \$ _____

Vehicles

List each vehicle including year, make, model, VIN No., and value.

Value \$ _____

Value \$ _____

Other Assets

Describe any other asset that is not included in the above categories.

Value \$ _____

Value \$ _____

Value \$ _____

Value \$ _____

Value \$ _____

Value \$ _____

Value \$ _____

Value \$ _____

Value \$ _____

Value \$ _____

Value \$ _____

Value \$ _____