



TYPE OF ACCOUNT (SAVINGS/CHECKING/CD):
LOCATION OF ACCOUNT:
ACCOUNT NUMBER:
OWNERSHIP STATUS (JOINT/INDIVIDUAL/OTHER):
AMOUNT:

<b>REAL ESTATE</b>
DESCRIPTION:
OWNERSHIP STATUS:
COPY OF DEED: YES NO
MORTGAGE/LIENS:
MARKET VALUE:

DESCRIPTION:
OWNERSHIP STATUS:
COPY OF DEED: YES NO
MORTGAGE/LIENS:
MARKET VALUE:

<b>STOCKS AND BONDS</b>
DESCRIPTION:
OWNERSHIP STATUS:
LOCATION OF STOCK OR ACCOUNT:
ACCOUNT NUMBER:

<b>IRA/401(K)</b>
NAME OF ACCOUNT:
LOCATION OF ACCOUNT:
BENEFICIARY OF IRA/401(K):
ACCOUNT NUMBER:
VALUE:

<b>LIFE INSURANCE</b>
INSURED:
NAME OF COMPANY AND ADDRESS:
TYPE OF INSURANCE:
OWNERSHIP STATUS:
BENEFICIARY:
FACE VALUE AMOUNT:

<b>PERSONAL PROPERTY</b>
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ITEM	VALUE	PERSON TO RECEIVE

<b>TOTAL VALUE OF ESTATE:</b>	<b>\$ _____</b>
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NAME:	ADDRESS:	PHONE NUMBER:
INITIAL TRUSTEE:		
SUCCESSOR TRUSTEE:		
PERSONAL REPRESENTATIVE:		
ALTERNATE PERSONAL REP:		
GUARDIAN:		
ALTERNATE GUARDIAN:		
CONSERVATOR:		
ALTERNATE CONSERVATOR:		
PATIENT ADVOCATE:		
ALTERNATE PATIENT ADVOCATE:		
POWER OF ATTORNEY:		
ALTERNATE POA:		
BENEFICIARIES		
NAME	ADDRESS	PORTION OF ESTATE TO RECEIVE
SPECIFIC REQUESTS:		