# ASSET CHECKLIST

| Residence Property | Estimated Market Value | Loans |
|---|---|---|
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**Other Real Estate, Rental Incomes, or Time Shares**

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|---|---|---|
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**Stocks, Bonds, Partnerships, Other Business Investments**

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|---|---|---|
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**Bank Accounts**

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|---|---|---|
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| | | |

**Retirement (Pensions, Mutuals, IRA's, 401k, etc.)**

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|---|---|---|
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| | | |

**Insurance Policies (Life, Health, Annuities, etc.)**

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|---|---|---|
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**Vehicles (Cars, Boats, Cycles, RV, Airplanes, Jet Skis)**

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|---|---|---|
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**Collectables**

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|---|---|---|
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**Other Assets (Furniture, Tools, Patents, Leases, Equipment, Notes, Court Awards, etc.)**

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|---|---|---|
| | | |
| | | |

Attorney's Name & Phone#_____

Tax Preparer Name & Phone#_____

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