

Estate Plan Asset Checklist

Date: _____

To: [Recipient's Name]

Dear [Recipient's Name],

As part of your estate planning process, please find below a checklist of assets to be considered:

Real Estate

- Primary Residence: _____
- Vacation Home: _____
- Investment Properties: _____

Financial Accounts

- Checking Accounts: _____
- Savings Accounts: _____
- Retirement Accounts (401k, IRA, etc.): _____
- Investment Accounts: _____

Life Insurance

- Policy 1: _____ Amount: _____
- Policy 2: _____ Amount: _____

Personal Property

- Vehicles: _____
- Jewelry and Collections: _____
- Valuable Personal Items: _____

Debts and Liabilities

- Mortgage: _____
- Personal Loans: _____
- Credit Card Debt: _____

Please review this checklist and provide any additional information or updates as necessary. Feel free to contact me with any questions or for further assistance.

Sincerely,

[Your Name]

[Your Contact Information]