

Estate Planning Asset Summary

Date: [Insert Date]

To Whom It May Concern:

Subject: Summary of Assets for Estate Planning

Dear [Recipient's Name],

This letter serves as a summary of my current assets as part of the estate planning process. Below is a detailed list of my assets with their respective values:

Real Estate

- Primary Residence: [Address] - Estimated Value: \$[Amount]
- Vacation Home: [Address] - Estimated Value: \$[Amount]

Financial Accounts

- Checking Account: [Bank Name] - Balance: \$[Amount]
- Savings Account: [Bank Name] - Balance: \$[Amount]
- Retirement Account: [Type] - Balance: \$[Amount]

Investments

- Stocks: [Company Names] - Total Value: \$[Amount]
- Bonds: [Details] - Total Value: \$[Amount]

Personal Property

- Vehicle: [Make & Model] - Estimated Value: \$[Amount]
- Jewelry: [Description] - Estimated Value: \$[Amount]

Liabilities

- Mortgage Balance: \$[Amount]
- Other Loans: \$[Amount]

The total estimated net worth is approximately \$[Total Net Worth]. Please feel free to reach out if you need any additional information.

Sincerely,

[Your Name]

[Your Address]

[Your Contact Information]