

Estate Analysis Form

Instructions: Complete the form below, being as accurate as possible. When it's completed visit www.assetfoundation.com/steps.htm and read the Ten Steps to getting started. You will see that Step One is to complete this form. Once this is done move on to Step Two. And, keep going!

Indicate how the asset is currently titled (J = Joint, H= Husband, W = Wife, S = Single, T = Trust.) Total each column and summarize at the bottom of the form to determine your total net worth.

Personal Information	
Name:	Phone:
Address	State
City:	ZIP:

Current Estate Plan Information	
Date Current Estate Plan Created	Date Current Estate Plan Reviewed
<input type="checkbox"/> Last Will and Testament	<input type="checkbox"/> Trusts (RLT, IUT, CRAT, etc.)
<input type="checkbox"/> Community Property Agreement	<input type="checkbox"/> Family Limited Partnership
<input type="checkbox"/> Power of Attorney	<input type="checkbox"/> Long Term Care Insurance
<input type="checkbox"/> Living Will	<input type="checkbox"/> Medicare Supplement Insurance

Financial Information				
Real Estate	State	Fair Mkt. Value	Mgt. Amount Held	J/H/W/S/T
1.				
2.				
3.				
4.				
5.				
6.				
Promissory Notes/Deeds of Trusts				J/H/W/S/T
1.				
2.				
Business Interests (Corporations, Partnerships, Etc.)				
1.				
2.				
Life Insurance/Annuities				J/H/W/S/T
1.				
2.				
3.				

Contact Information:
 Questions: 1.866.927.0979 • Email: info@assetfoundation.com
 P.O. Box 1046, Spanish Fork, Utah 84660

Financial Information				
Personal Property (Vehicles, Furniture, Jewelry, Etc.)	State	Fair Mkt. Value	Mgt. Amount Held	J/H/W/S/T
1.				
2.				
3.				
Brokerage Accounts/Mutual Fund				J/H/W/S/T
1.				
2.				
3.				
Retirement Accounts				J/H/W/S/T
1.				
2.				
Certificates Of Deposit(T ime Deposits)				J/H/W/S/T
1.				
2.				
Bank/Credit Union/Money Market Accounts				J/H/W/S/T
1.				
2.				
3.				
Cash Flow/Income Source	Per Month			
1.				
2.				
3.				
Approximate Total Monthly Income: \$	Approx. Total Assets: \$			
Approximate Total Monthly Expenses: \$	Liabilities: \$			
Approx. Net Equity: \$				

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