

Personal Asset Worksheet

Use this worksheet to identify your current assets and value. Identify your current beneficiary (if applicable) and name the person for future designation.

Type of Asset	Current Value	Current Beneficiary (if applicable)	Future Designation
Home/Residence			
Land			
Other:			
Savings Accounts			
Checking Accounts			
Certificates of Deposit			
IRA (1)			
IRA (2)			
401K (1)			
401K (2)			
Mutual Funds			
Money Market			
Life Insurance Policy (1)			
Life Insurance Policy (2)			
Annuities			
Cash on Hand			
Education Account			
Household Goods			
Personal Collections			
Other Assets			
Total Assets			