

Appendix 3

Estimate of Estate Value

Instructions:

Estimate the value of each asset and the amount of each liability. You shouldn't have to look up exact amounts. Remember, this is only an estimate. Estimate assets at a high value, because inflation must be taken into account.

Assets	Estimated Value
Personal Residence	\$ _____
Investment Real Estate	_____
Vehicles/Boats, etc.	_____
Savings/CDs/Cash	_____
Stocks/Bonds	_____
Life Insurance (death benefits)	_____
IRAs	_____
Retirement that will go to heirs	_____
Annuities	_____
Small Business (value of portion you "own")	_____
Personal Property/Household/Jewelry	_____
Collectibles/Art	_____
Other	_____
Total Assets	\$ _____
Liabilities	
Home Mortgage	_____
Other Real Estate Mortgages	_____
Vehicle Debts	_____
Business Debts (if business is in your estate)	_____
Other Debts	_____
Amount you plan to leave to a charity	_____
Total Liabilities	\$ _____
Total Estate Value (Assets minus Liabilities)	\$ _____