**A p p e n d i x 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)**  $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_