**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)**  $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_