

Name of Estate:

Date of Death:

Probate Snap Shot Balance Sheet

Asset Category	Owned by Decedent	Owned by Decedent's Spouse/ Partner	Jointly Owned with Spouse/ Partner or Another (*)	Non-Probate (pass out outside)	Total By Category	Probate Comments
Cash	\$	\$	\$	\$	\$	
CDs						
Marketable Securities						
Mutual Funds						
House (Net Mortgage)						
Vacation Home (Net mortgage)						
Other Real Estate Investments						
Annuities						
IRAs						
Pension/Retirement						
Closely Held Business						
Possible Inheritances						
Possible Claims/Losses						
Liabilities						
Life Insurance						
Net Worth	\$	\$	\$	\$		

Sign below indicating the accuracy and completeness of the above balance sheet. Your advisors' work will be based on this information. To achieve your goals you must follow up on recommendations made and advise of changes.

Named Executor's Signature

Date

Named Co-Executor Signature

Date