

ASSET LIST OF

Date: _____

This list is an aid to your personal representative, who must locate all of your property. It is especially important to list assets that may be difficult to discover, such as safety deposit boxes, accounts with electronic-only statements, or hidden valuables.

Financial advisor(s): _____

CPA/accountant: _____

	CONTACT/INSTITUTION	DESCRIPTION
Retirement Accounts:		
Life Insurance:		
Bank Accounts:		
Other:		