

Valuing your estate*

Asset category	In your name	In your spouse's name	Owned jointly**
Taxable accounts	\$ _____	\$ _____	\$ _____
Retirement accounts	_____	_____	_____
Life insurance	_____	_____	_____
Annuities	_____	_____	_____
Personal residence	_____	_____	_____
Other real estate	_____	_____	_____
Personal property (cars, furniture, jewelry, artwork)	_____	_____	_____
Business interests	_____	_____	_____
Other	_____	_____	_____
Subtotal	\$ _____	\$ _____	\$ _____
Minus debts	_____	_____	_____
Total	\$ _____	\$ _____	\$ _____
Date	_____		

*This worksheet is intended to provide only an estimate of your estate value; you should not rely on it as an exact accounting.

**Indicate if the joint owner is someone other than your spouse and if any of the assets are community property. The following states are community property states and as such have different rules for ownership and transfer upon death: Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington, and Wisconsin have mandatory systems; Alaska, Florida, and Tennessee have optional systems.