

Gross Estate Calculation Form

Your gross estate is the total value of all your assets, including those of your spouse if married.

Category	Asset Type	Asset Value	Additional Notes <small>(Please list other types of assets such as oil and gas rights or assets that you have the right to appoint to others.)</small>
Real Estate	Home	\$0	
	Vacation Property	\$0	
	Rental Property	\$0	
	Land	\$0	
	Sub Total	\$0	
Bank Accounts	Savings	\$0	
	Checking	\$0	
	Money Market	\$0	
	CDs	\$0	
	Sub Total	\$0	
Retirement Accounts	IRA	\$0	
	Roth IRA	\$0	
	Keogh	\$0	
	SEP	\$0	
	401k	\$0	
	Sub Total	\$0	
Investments	Stock Brokerage	\$0	
	Mutual Funds	\$0	
	Stocks in Certificate Form	\$0	
	Bonds	\$0	
	Annuities	\$0	
	Money Market	\$0	
	Limited Partnerships	\$0	
	Promissory Notes	\$0	
	Sub Total	\$0	
	Business Ownership	Sole Proprietorship	
Partnership		\$0	
C Corporation		\$0	
S Corporation		\$0	
Limited Liability Company		\$0	
Sub Total		\$0	
Personal Property	Autos	\$0	
	Home Furnishings	\$0	
	Jewelry	\$0	
	Art	\$0	
	Sub Total	\$0	
Insurance Policies	Term	\$0	
	Group	\$0	
	Whole	\$0	
	Universal	\$0	
	Survivorship	\$0	
	Sub Total	\$0	
	Gross Estate Total	\$0	