

Inventory of Assets and Debts

Assets				
Asset	Date-of-death value	Value of deceased person's share	How title held*	Probate?
Real estate				
Cash accounts				
Stocks, bonds, and mutual funds				
Life insurance and annuities				
Retirement accounts				
Wages or benefits				
Business interests				
Limited partnerships				
Vehicles				
Other assets				
Total assets	\$			
<p>* Abbreviations S: solely owned CP: community property TBE: tenancy by the entirety T: held in trust JT: joint tenancy TIC: tenancy in common P: partnership POD: payable-on-death CP WROS: community property with right of survivorship</p>				

Credits: www.nolo.com "Inventory of Assets and Debts"

Debts			
Debt	Amount	Creditor	Date next payment due
Car loan			
Credit card #1			
Credit card #2			
Other debt			
Total debts	\$		
Total net value of estate	\$		

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