***SCHEDULE OF PROPERTY for***

***NAME(S):***

**Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

***REAL ESTATE***

| **Type of Real Estate****(e.g., primary residence, winter home, lot, etc.)** | **Street** | **City** | **County** | **State** | **Zip** | **Owners** | **Beneficiaries** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Primary residence |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |

***REFUNDS OF DEPOSITS***

| **Company** | **Owners** | **Beneficiaries** |
| --- | --- | --- |
|  |  |  |

***OIL, GAS, AND MINERAL RIGHTS***

| **Type of Rights** | **Lease?** | **City** | **County** | **State** | **Zip** | **Owners** | **Beneficiaries** |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |  |

***TIMESHARES***

| **Timeshare Company** | **Location** | **County** | **State** | **Zip** | **Deed?** | **Owners** | **Beneficiaries** |
| --- | --- | --- | --- | --- | --- | --- | --- |
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***SAFE DEPOSIT BOXES***

| **Bank** | **Branch Address** | **Owners** |
| --- | --- | --- |
|  |  |  |
|  |  |  |

***NOTES/LOANS PAYABLE TO YOU***

| **Payor’s Name** | **Amount Due** | **Payee** | **Terms of Repayment** | **Secured by Deed of Trust?** | **Written Promissory Note?** |
| --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

***BANK ACCOUNTS (e.g., checking, savings, money market, CD accounts)***

| **Bank Name** | **Type of Account** | **Account Number****Last 4 digits** | **Owners** | **Beneficiaries** |
| --- | --- | --- | --- | --- |
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***BROKERAGE ACCOUNTS (non-retirement accounts – e.g., brokerage accounts, stock or bond accounts, 529 accounts, etc.)***

| **Financial Company** | **Type of Account** | **Account Number****Last 4 digits** | **Owners** | **Beneficiaries** |
| --- | --- | --- | --- | --- |
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***RETIREMENT ACCOUNTS (e.g., Pensions, IRAs, Roth IRAs, 401ks, Deferred Compensation, etc.)***

| **Financial Company** | **Type of Account** | **Account Number****Last 4 digits** | **Owner** | **Beneficiaries** |
| --- | --- | --- | --- | --- |
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***ANNUITIES***

| **Financial Company** | **Qualified or** **Non-Qualified** | **Account Number****Last 4 digits** | **Owners** | **Annuitant (whose life is the policy based on)** | **Beneficiaries** |
| --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

***LIFE, ACCIDENTAL DEATH AND DISMEMBERMENT INSURANCE***

| **Financial Company** | **Type of Insurance** | **Account Number****Last 4 digits** | **Owners** | **Annuitant (whose life is the policy based on)** | **Beneficiaries** |
| --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |
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***PAPER STOCK CERTIFICATES***

| **Company** | **Location of Certificates** | **Owners** |
| --- | --- | --- |
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***U.S. SAVINGS BONDS***

| **Treasury Direct Account Number** | **Series** | **Purchase Date** | **Maturity Date** | **Amount** | **Owners** | **Beneficiaries** | **Location of Bonds** |
| --- | --- | --- | --- | --- | --- | --- | --- |
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***TITLED TRANSPORTATION (e.g, motor vehicles, golf carts, RVs, boats, trailers, planes, etc.)***

| **Type** | **Year** | **Make** | **Model** | **State Registered** | **VIN** | **Loan or Leased?** | **Owners (include OR, AND, AND/OR as it appears on title)** | **Beneficiaries** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
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***BUSINESS OWNERSHIPS***

| **Business Name** | **Nature of Business** | **Type of Entity (sole proprietor, LLC, partnership, corporation)** | **State Entity Located** | **Owners** |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
|  |  |  |  |  |

***OTHER INSURANCE (e.g, homeowner, vehicle, umbrella, long term care, etc.)***

| **Insurance Company** | **Insured** | **Type of Insurance** | **Policy Number** |
| --- | --- | --- | --- |
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***VALUABLE PERSONAL PROPERTY (e.g., artwork, coins, bullion, stamps, antiques, etc.)***

| **Description of Property** | **Location of Property** | **Owners** |
| --- | --- | --- |
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