



THE TIM BARKLEY LAW OFFICES



Tim Barkley
Asset & Wealth Protection Attorney.
P.O. Box 1136, Mount Airy, Maryland 21771. (301) 829-3778. www.barkleylaw.com

Financial Inventory Worksheet

Please provide your information in the blanks below. "Value" means fair market value, i.e., what you think you could receive for the asset in a voluntary sale to a willing buyer, neither of you under any compulsion or delusion as to value. Use the "yard sale" value for personal property. In the "Title" column, if you are single no listing is needed. If you are married, please list "H" for Husband, "W" for Wife, "J" for Joint, or "T" for Tenants in Common. Before you meet your attorney, complete this worksheet, the Questionnaire, the Estate Planning Information Form, and review the Initial Meeting Memorandum .

YOUR ASSETS:	Value	Title	YOUR LIABILITIES:	Value
Cash			Current Bills	
---Cash on hand			---Credit Cards	
---Checking accounts			---Charge Accounts	
---Savings accounts			---Debts to individuals	
---C.D.s/Money Markets			---Other	
---Money owed you			Mortgages	
Marketable Securities			---Your Home	
---Stocks			---Vacation/Resort	
---Bonds			---Investment/Rental	
---Government securities			---Other	
---Mutual Funds			Loans	
---Other Investments			---Auto #1	
Personal Property			---Auto #2	
---Automobile #1			---Business (personally liable)	
---Automobile #2			---Education	
---Household Furnishings			---Bank notes	
---Art, antiques, collectibles			---Co-signature with another	
---Clothing, furs, jewelry			Other Liabilities	
---Other possessions			TOTAL LIABILITIES:	
Real Estate				
---Your home				
---Vacation Investment				
---Other property				
Pension				
---Retirement Plan #1				
---Retirement Plan #2				
---IRA #1				
---IRA #2				
---Keogh				
Long Term Assets				
---Business equity				
---Life Insurance				
---Life Insurance				
---Life Insurance				
---Life Insurance			GRAND TOTAL:	
---Annuities			Total Assets (from left column)	
---Inheritances/Gifts			<i>Minus</i>	-
Other Assets			Total Liabilities (from right column)	
TOTAL ASSETS:			<i>Equals</i>	=
			Your Net Estate:	