



# The Rutherford Law Firm, PLLC

WILLS · TRUSTS · PROBATE · ESTATE ADMINISTRATION

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ESTATE PLANNING · CLIENT WORKSHEET

## Estate Planning Inventory & Asset Worksheet

A clear picture of what you own is the foundation of a good plan. Use this worksheet to inventory your assets, debts, and beneficiary designations before you meet with the attorney. How property is titled and who is named as beneficiary often controls where it goes, sometimes regardless of your will.<sup>1</sup>

### ◆ Real estate

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Property address(es)

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How titled (sole, joint, community)

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Approximate value / mortgage balance

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### ◆ Financial accounts

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Bank / credit union accounts (institution, type)

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Investment / brokerage accounts

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Retirement accounts (401(k), IRA) and named beneficiaries

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Life insurance (company, policy, beneficiary)

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### ◆ Business & valuable property

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Business interests (entity, ownership %)

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Vehicles, collections, or valuables

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Items you want to leave to a specific person

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### ◆ Debts & obligations

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## Mortgages, loans, and lines of credit

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## Credit cards and other debts

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## ◆ Notes for the attorney

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### Anything unusual about ownership, beneficiaries, or family circumstances

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## REFERENCES & SOURCES

1. Tex. Est. Code ch. 201 (intestate succession; how property passes with no will). [statutes.capitol.texas.gov](https://statutes.capitol.texas.gov)
2. Tex. Est. Code § 251.051 (a will must be written, signed, and attested by two credible witnesses age 14 or older). [statutes.capitol.texas.gov](https://statutes.capitol.texas.gov)
3. Internal Revenue Service, Estate and Gift Taxes. [www.irs.gov](https://www.irs.gov)
4. Texas Law Help, "Wills, Estate Planning and Probate." [texaslawhelp.org](https://texaslawhelp.org)
5. Texas Disciplinary Rules of Professional Conduct, Part VII (Rules 7.01–7.06). [www.texasbar.com](https://www.texasbar.com)

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