

Client Name: _____

Date: _____

	HUSBAND	JOINT WRS	WIFE	TOTALS
HOME REAL ESTATE				
1				
2				
TIMESHARES				
1				
CASH				
1				
2				
3				
CD's				
1				
STOCKS & BONDS				
1				
2				
3				
4				
5				
Items in Safe Deposit Box				
1				
2				
BUSINESS				
1				
2				
MISCELLANEOUS				
1				
2				
3				
PROBATE TOTAL				
JWRS TOTAL				
MISC NON-PROBATE				
1				
2				
MISC TOTAL				
RETIREMENT ACCOUNTS				
1				
2				
3				
TOTAL RETIREMENT				
NON-LIFE TOTAL				
LIFE INSURANCE				
1				
2				
3				
4				
TOTAL INSURANCE				
TOTALS				

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	HUSBAND	JOINT WRS	WIFE	TOTALS
Non-Gross Estate Assets				
Life Insurance Trust				
Giftling Trust				
Other				
Social Security				
Pensions				

The Asset Information Form lists your assets in a way that allows me to determine how much of your assets actually run through your estate and how much of your assets actually have a beneficiary designation. The items listed above the shaded area are assets that are considered to be a part of your probate estate. The items listed below the shaded area will be distributed according to the beneficiary designations you have made for each of them. A few things to keep in mind when completing this form are:

(1) All jointly owned real estate is owned as tenants in common which means that half of the value is considered to be that of one person and half of the value is considered to be that of the other person. For example if your home is jointly owned and has a fair market value of \$300,000 with a mortgage of \$100,000 then \$100,000 would be put in the husband's column and \$100,000 would be put in the wife's column.

(2) All jointly held bank accounts or brokerage accounts are owned as joint tenants with right of survivorship and would be recorded in the middle column ("JOINT WRS").

(3) Under the "Miscellaneous Section" please list your automobiles and the total of your personal property (everything in your home including personal items, china, furniture, etc.). The value of your personal property is just your best guess and should be recorded in the "Joint WRS" column.

(4) "Misc Non-Probate" items include such things as annuities and any other assets you have that carry a beneficiary designation other than retirement accounts and life insurance which are specifically addressed on this form.

Rhodes Law Firm, P.C.

3938 Washington Road - Martinez, GA 30907

(706) 724-0405 - (803) 649-6060 - (706) 724-0470 Fax