

	A	B	C	D	E	F	G	H	I
1		Client Name:					Date:		
2									
3				Husband Living Trust		Joint Living Trust		Wife Living Trust	Total
4			HUSBAND		JOINT WRS		WIFE		
5	1	HOME							
6		REAL ESTATE							
7	2								
8	3								
9	4								
10	5								
11	6								
12	7								
13	8								
14	9								
15		CDs							
16	1								
17									
18		CASH							
19	1								
20	2								
21	3								
22		STOCKS & BONDS							
23	1								
24	2								
25	3								
26									
27		SAFE DEPOSIT BOX							
28	1								
29									
30		PARTNERSHIP							
31	1								
32	2								
33									
34		BUSINESS							
35	1								
36	2								
37									
38		MISCELLANEOUS							
39	1	Personal Property							
40	2	Cars							
41	2								
42		Living Trust Total		0		0		0	0
43		PROBATE TOTAL	0				0		0
44		JWRS TOTAL		0					0
45		Subtotal	0	0	0	0	0	0	0
46									
47									
48		MISC NON-PROBATE							
49	1								
50	2								
51		MISC TOTAL	0	0	0	0	0	0	0
52									
53		RETIREMENT ACCOUNTS							
54	1								
55	2								
56	3								
57	4								
58									
59		TOTAL RETIREMENT	0	0	0	0	0	0	0
60									
61		NON-LIFE TOTAL	0	0	0	0	0	0	0
62									
63		LIFE INSURANCE							
64	1								
65	2								
66	3								
67	4								
68									
69									
70									
71		TOTAL INSURANCE	0		0		0		0
72									
73		TOTALS	0	0	0	0	0	0	0
74									
75		Non-Gross Estate Assets							
76		Life Insurance Trust							
77		Gifting Trust							
78		Survivorship Life Ins.							
79		Other							
80		CRT							
81		SubTotal	0	0	0	0	0	0	0
82		Total Gross & Other	0	0	0	0	0	0	0
83		Income							
84		Social Security							
85		Pensions							
86		Total Income	0				0		0
87		h:\Templates\Asset Sheet - Trust.xls\Assets							