DECEDENT’S TRUST & ESTATE INVENTORY Date of Death ________________

NET VALUE	REAL PROPERTY (Provide Deed, Tax Bill & Loan Stmt) *indicates residence	Value	Loan	Title	*SP
	BANK ACCOUNTS (Provide Bank Name, Type of Account and Account Number)				
	SECURITIES (Provide Institution Name and Account Number) and PROMISSORY NOTES				
	TANGIBLE PERSONAL PROPERTY				
	LIFE INSURANCE (Type, Company, Amount) (Provide Declarations Page)	**Insured**	**Owner**	**Beneficiary**	
	RETIREMENT PLANS AND IRAs		**Owner**	**Beneficiary**	
	BUSINESS INTERESTS				**SP**
	EXPECTANCIES (Inheritances, Trusts, Deferred Compensation, Powers of Appointment)				
	PRIOR GIFT TAX RETURNS FILED? ○ YES (provide copies) ○ NO				

* Separate Property - Please insert initials of separate property owner, if any