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Estate Planning — Optional Asset Worksheet

A companion to the Estate Planning Questionnaire — completely optional

Optional, and only if it helps you

This worksheet is **completely optional**, and **you do not need this to meet with us.** Depending on your plan we may not need this level of detail; it is here for clients who would like a head start. You can also simply bring recent statements.

REAL ESTATE

Property address	Approx. value	Mortgage balance	Owner(s)

FINANCIAL ACCOUNTS (bank, brokerage, retirement)

Institution	Type of account	Approx. value	Beneficiary on file?

LIFE INSURANCE & ANNUITIES

Company	Death benefit	Beneficiary on file?

BUSINESS INTERESTS

Business name	Type / your %	Approx. value

Beneficiary designations matter

Retirement accounts and life insurance usually pass by beneficiary designation — not by your will — so keeping them current is part of a good plan.

When you've finished

Please either bring this completed form to your meeting or email it back to us — preferably by replying to the email address you received it from. (Our general info@ryanreiffert.com inbox has heavy spam filtering, so a reply to your original sender is most reliable.)

If you have any questions, you are welcome to bring them to your consultation, call us, or ask by email.