

Asset Valuation Worksheet

Client Names: _____

Date Form Completed: _____

	<u>Husband</u>		<u>Wife</u>		<u>Joint</u>
	<u>Probate</u>	<u>Non-probate</u>	<u>Probate</u>	<u>Non-probate</u>	<u>Non-probate</u>
Real Estate:					
No. of Homestead Acres:					
Per Acre Valuation:					
Value of Homestead Acres:					
No. of Other Acres:					
Per Acre Valuation:					
Value of Other Acres:					
Less Debt Securing Real Estate:					
Homestead Acres:					
Other Acres:					
Net Value of Real Estate					
Cash Accounts:					
Checking Accounts					
Savings Accounts					
CD's					
Other Cash					
POD Accounts:					
Life Insurance Cash Value					
Life Insurance on others:					
Annuities:					
Personal Property:					
Vehicles:					
Less Debt on Vehicles:					
Total Value of Vehicles:					
Stocks:					
Bonds:					
Equities:					
Retirement Accounts:					
Livestock:					
Crops:					
Soybeans					
Corn					
Other					
Machinery:					
Less Debt on Machinery:					
Total Value of Machinery:					
Total Non-Real Estate Assets					
Total Assets					
Life Insurance Death Benefit					
One-half joint assets					
Total Estate Tax Value					
Total Taxable Estate					