

## Asset Worksheet

No matter the size of your family, an asset worksheet helps everyone see their net worth in a cohesive way and determine what they need to protect.

Type of Asset	Person 1	Person 2	Joint	Total
Cash (Checking, savings, etc.)	\$	\$	\$	\$
Investments & Retirement Accounts	\$	\$	\$	\$
Life Insurance	\$	\$	\$	\$
Annuities	\$	\$	\$	\$
Real Estate (primary residence)	\$	\$	\$	\$
Real Estate (other)	\$	\$	\$	\$
Other Assets (vehicles, collector items, jewelry, etc.)	\$	\$	\$	\$
Business Interests	Value: \$ % Owned:	Value: \$ % Owned:	\$	\$
<b>Total</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>