



FREE CLIENT WORKSHEET



FAMILY ASSET INVENTORY™

One clear inventory to help your family know what exists and where to begin.

Fill it out electronically or print it and write by hand.

How to Use This Inventory

Create one organized list of the assets, accounts and obligations your family may need to locate.

Complete what you know today. You can update the inventory whenever something changes.

Use only the last four digits of an account or policy number when identification is helpful.

Do not record passwords, PINs or other access credentials in this worksheet.

Keep the completed inventory in a secure place.

Make sure the appropriate people know where the completed inventory can be found.

KEEP IT CURRENT

Review it annually and after a major financial or life change.

Inventory owner(s)

Last reviewed

Where this completed inventory is kept

REAL ESTATE

Record ownership, location and intended transfer method.

PROPERTY / LOCATION	CURRENT TITLE / OWNERSHIP	INTENDED METHOD	DOCUMENT LOCATION

REAL ESTATE NOTES / ITEMS TO LOCATE

BANK & CASH ACCOUNTS

Do not record passwords. Use only the last four digits if helpful.

INSTITUTION	ACCOUNT TYPE / LAST 4	OWNERSHIP	TRANSFER / BENEFICIARY

BANKING NOTES / ITEMS TO REVIEW

INVESTMENTS, RETIREMENT & ANNUITIES

Beneficiary-designated assets require individual review.

INSTITUTION	TYPE / LAST 4	OWNER	BENEFICIARY	REVIEWED
				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐

INVESTMENT / RETIREMENT NOTES

LIFE INSURANCE

Record enough information for your family to locate each policy.

COMPANY	POLICY / LAST 4	INSURED	BENEFICIARY	REVIEWED
				☐
				☐
				☐
				☐
				☐
				☐
				☐

LIFE INSURANCE NOTES

BUSINESS, VEHICLES & VALUABLE PROPERTY

Keep titles, agreements and appraisals with your important records when appropriate.

ASSET	OWNERSHIP / TITLE	APPROX. VALUE	LOCATION	TRANSFER / NOTES
Business interest				
Vehicle 1				
Vehicle 2				
Boat / RV				
Jewelry / collectibles				
Other valuable property				
Other				

ADDITIONAL PROPERTY / DOCUMENT NOTES

LIABILITIES & OTHER PROPERTY

A complete picture includes obligations and less obvious assets.

ITEM	CREDITOR / LOCATION	TYPE / LAST 4	NOTES
Mortgage / HELOC			
Credit / loan			
Personal obligation			
Digital / intellectual property			
Expected inheritance / receivable			
Other			
Other			

FINAL NOTES / FOLLOW-UP

IMPORTANT USE & COPYRIGHT NOTICE

Keep the completed inventory secure.

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Educational use

This inventory is an organizational and educational resource. It is not legal, tax or financial advice. Keep completed information secure and consult appropriate professionals when advice is needed.

FINAL REVIEW

Before storing this inventory, consider whether the following are complete:

- ☐ Major assets and accounts are listed
- ☐ Beneficiary-designated assets have been reviewed
- ☐ Document locations are identified
- ☐ Passwords, PINs and full account numbers are not included
- ☐ The appropriate person knows where this inventory is kept

Date reviewed

Next planned review

