

CLAIM MY LEGACY

MASTER ASSET INVENTORY™

01 - DISCOVER | Know what you have.

DISCOVER → REVIEW → REQUEST → SUBMIT → VERIFY → COMPLETE

Client / Family: _____

Trust Name: _____

DISCOVER RULE: At this stage, your job is not to decide. Your job is to identify.

Asset / Account	Institution / Record Keeper	Last 4	Current Owner	Beneficiary?	Notes

DISCOVER COMPLETE? ☐ Yes ☐ Not yet

My next step: _____

Do not change ownership or beneficiaries yet. First, build the inventory.