

THE LAW OFFICE OF
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Licensed in Florida and South Carolina
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Supreme Court as a Specialist
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ASSET SUMMARY SHEET
(Single United States Citizen)

Name of Client

DESCRIPTION
OF ASSETS

VALUE OF ASSETS
PLEASE LIST:

Real Estate

Stocks & Bonds

Checking Accounts

Savings Accounts

CDs

Notes & Receivables

Life Insurance

Annuities and IRAs

Other Property

Less Debts

(_____)

TOTAL

If an asset is owned in any form of co-ownership, please let us know, in writing, which asset it is and how many co-owners there are. For property in a Revocable Trust, please place "RT" beside it. If property is in an Irrevocable Trust, please place "IT" beside it.

This information will be used in planning your estate. If the information is not correct, the advice which you are given may not be correct and may create unexpected and adverse estate planning and tax consequences. Please sign below as your acknowledgment that the information is substantially correct and that we may rely upon its validity in advising you.

SIGNATURE

_____, 20_____
DATE