
PROPERTY WORKSHEET for WILL

Use this list to jog your memory and to make notes about the property you own. If you have ideas about who should receive what, make a note about that too. But be sure to decide for those items through your will, living trust, or beneficiary designations because this document does not have the legal power to distribute property. You don't need to inventory what you own if you plan to leave all or most of it to one person or a group of people. In that case, just make note of the few specific items you wish to pass outside of that main gift.

REAL ESTATE (list each piece of real estate by address)

CASH AND OTHER LIQUID ASSETS

CASH

CHECKING ACCOUNTS

SAVINGS AND MONEY MARKET ACCOUNTS

CERTIFICATES OF DEPOSIT

ALTERNATIVE CURRENCIES (Bitcoin, local currencies, etc.)

PRECIOUS METALS

RETIREMENT PLAN ASSETS (401(k), 403(b) plans, IRAs, Roth IRAs)

SECURITIES (not in retirement accounts)

MUTUAL FUNDS

LISTED AND UNLISTED STOCKS

GOVERNMENT, CORPORATE, AND MUNICIPAL BONDS

ANNUITIES

VEHICLES

AUTOMOBILES, TRUCKS, and RECREATIONAL VEHICLES

PLANS, BOATS, and OTHER VEHICLES

OTHER PERSONAL PROPERTY

HOUSEHOLD GOODS

VALUABLE CLOTHING, JEWELRY, AND FURS

TOOLS and EQUIPMENT

COLLECTIBLES, INCLUDING ANTIQUES, AND ARTWORKS

VALUABLE ANIMALS, and LIVESTOCK

MONEY OWED TO YOU (personal loans, etc.)

DEATH BENEFITS

LIFE INSURANCE (other than term life)

MISCELLANEOUS (any personal property not listed on page 4)

DIGITAL ASSETS

This section is used to assist you in thinking about your "online legacy". Make notes about your digital accounts and property. If you would like to provide access to your survivors, leave user names and passwords in a separate secured document.

EMAIL ACCOUNTS (Twitter, Facebook, Instagram, etc.)

SOCIAL MEDIA ACCOUNTS (Twitter, Facebook, Instagram, etc.)

SUBSCRIPTIONS (Amazon Prime, Netflix, etc.)

MARKETPLACE ACCOUNTS (Amazon, eBay, Etsy, Craigslist)

APPS (for phone or tablet)

PHOTOS, BOOKS, MUSIC, VIDEOS (online, on your phone, computer, or external drive)

FILE SHARING AND STORAGE ACCOUNTS (Dropbox, OneDrive, Google Docs, etc.)

FINANCIAL ACCOUNTS (online banking, trading, credit card monitoring, budget programs)

MEDICAL ACCOUNTS (doctor's portals, online pharmacies)

INSURANCE ACCOUNTS (online accounts for car, home, life)

UTILITIES (online accounts for electric and gas, phone, internet, etc.)

DATA STORED ON YOUR COMPUTER (contact lists, tax or financial software)

BUSINESS PERSONAL PROPERTY

BUSINESS OWNERSHIPS (partnerships, sole proprietorships, limited partnerships, limited liability companies, corporations)

INTELLECTUAL PROPERTY (domain names, copyrights, patents, and trademarks – including the right to receive royalties)

MISCELLANEOUS RECEIVABLES (mortgages, deeds of trust, or promissory notes held by you, any rents due from income property you own, and payments due for professional or personal services or property sold by you for which you have not been fully paid by the purchaser)

ADDITIONAL NOTES
