

# THE PATON LAW FIRM, LLC

PHONE: (201) 291-1603

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www.Patonlawfirm.com

## ASSET LIST

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

<u>Real Estate</u>	<u>Market Value</u>	<u>Mortgage</u>	<u>Equity</u>	<u>Owner*</u> <u>(Indiv. or Jt.)</u>
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Residence	\$ _____	\$ _____	\$ _____	_____
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Business Property	\$ _____	\$ _____	\$ _____	_____
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Vacation Home	\$ _____	\$ _____	\$ _____	_____
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Rental	\$ _____	\$ _____	\$ _____	_____
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<u>Investments</u>	<u>Market Value</u>	<u>Loans</u>	<u>Net Value</u>	<u>Owner*</u> <u>(Indiv. or Jt.)</u>
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Stocks	\$ _____	\$ _____	\$ _____	_____
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Mutual Funds	\$ _____	\$ _____	\$ _____	_____
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Bonds	\$ _____	\$ _____	\$ _____	_____
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U.S. Bonds	\$ _____	\$ _____	\$ _____	_____
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Mortgage	\$ _____	\$ _____	\$ _____	_____
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Loans	\$ _____	\$ _____	\$ _____	_____
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TOTAL \$ \_\_\_\_\_

\* NOTE that joint assets, or assets that name a beneficiary at your death, will be distributed to the

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**named joint owner or beneficiary. The Will does not override these requirements. Life Insurance and Retirement Plans will be distributed to the named beneficiaries.**

<u>Employee Benefits</u>	<u>Market Value</u>	<u>Beneficiary</u>	<u>Owner</u>
Group Insurance	\$ _____	_____	_____
Personal Insurance	_____	_____	_____
Fraternal Assoc. Ins.	_____	_____	_____
Profit Sharing	_____	_____	_____
Pension Benefits	_____	_____	_____
Stock Options	_____	_____	_____
TOTAL			\$ _____

**Miscellaneous**

**Owned (Indiv. or Joint)**

Savings Account	\$ _____	_____
Cash (Checking Acct., Etc.)	_____	_____
Works of Art/Jewelry	_____	_____
Furniture	_____	_____
Automobiles	_____	_____
Personal Effects	_____	_____
TOTAL		\$ _____

<u>Business Interests</u>	<u>Total Market Value</u>	<u>Percentage of Interest</u>	<u>Value of Interest</u>
Corporation	\$ _____	\$ _____	\$ _____
Partnership	_____	_____	_____
Proprietorship	_____	_____	_____
TOTAL			\$ _____

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GRAND TOTAL \$ \_\_\_\_\_