



**Southwest Missouri Bank Trust Department**  
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# Estate Inventory Worksheet

## Instructions for Completing:

*Please complete the following Estate Inventory Worksheet. This will enable the Southwest Missouri Bank Trust Department to accurately assess your financial position and advise you as to an estate plan that is best suited for your estate planning goals. All information you provide is **strictly confidential** and will only be used for this purpose.*

*Exact values are not required, but try to be as accurate as possible. We encourage you to review actual documents (such as deeds, titles, certificates, accounts, etc.), rather than relying on your memory, so that ownership is not shown erroneously. To the extent possible, we ask that you attach copies of these documents to the form or bring them with you for our meeting. Having the completed form and copies of the relevant documents in advance of our meeting will help us save you time and provide you with the best advice.*

*Always feel free to call us if you have questions about filling out the Estate Inventory Worksheet, or any other matter. We look forward to meeting with you in the near future.*

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# Estate Inventory Worksheet

Date \_\_\_\_\_

Name \_\_\_\_\_  
 Last First DOB

Spouse \_\_\_\_\_  
 DOB

**Children's Names/Dates of Birth**

_____	____/____/____	_____	____/____/____
_____	____/____/____	_____	____/____/____
_____	____/____/____	_____	____/____/____

Items	Title/Deed Ownership (names)	Fair Market Value (approximate)
<b>1. Real Estate (addresses)</b> Tract I  Tract II  Tract III  Tract IV  Tract V		
<b>2. Vehicles (year &amp; make)</b> a.  b.  c.  d.		
<b>3. Bank Accounts (institutions)</b> a. <i>Savings</i> 1.  2.  3.  4.  b. <i>Checking</i> 1.  2.  3.  4.		

Items	Title/Deed Ownership (names)	Fair Market Value (approximate)
c. <i>Other (CDs, etc.)</i> 1. 2. 3. 4.		
<b>4. Stocks and Bonds</b>		
<b>5. Retirement Plans/IRAs</b>		
<b>6. Life Insurance (company)</b>	<b>(insured and beneficiary)</b>	
<b>7. Business Interests</b>		
<b>8. Equipment</b>		
<b>9. Household Goods &amp; Personal Effects</b>	<b>N / A</b>	
<b>10. Miscellaneous</b>		

<b>Liabilities (to whom owed)</b> (excluding normal monthly bills)	<b>What For</b> (names)	<b>Amount</b> (approximate)