

FAMILY ESTATE PLANNING INVENTORY ASSETS

Money.....
Cash on hand.....
Chequing Account
Guaranteed Investment Certificate (GIC'S Total Value).....
Real Estate (appraisal value).....
Stocks (market value)
Bonds (market or accrued value).....
Investment accounts
Life Insurance (cash value).....
Automobiles (market value).....
Personal Property (household, jewellery, etc.).....
Other.....
Total Assets.....

LIABILITIES

Credit Cards.....
Loans.....
Home Mortgage.....
Income Tax (Capital Gain etc.).....
Legal Fees (Probate & Estate Expense
Final Expenses.....
Others.....
Total Liabilities.....

Net Family Estate

Total Assets
Total Liabilities
Subtract your total Liabilities from your total Assets, this is your Net Family Income
Net Family Estate
Number of Children
Net Estate share per Child.....