



Asset Checklist

This is designed to help you value your estate.

Assets – Current Value

Home and other property	£ _____
Furnishings	£ _____
Vehicles	£ _____
Antiques	£ _____
Paintings	£ _____
Bank and Building Society Accounts	£ _____
Stocks and Shares	£ _____
Jewellery	£ _____
Life assurance	£ _____
Pension Benefits	£ _____
Other financial assets / savings.	£ _____
Other household contents.	£ _____
Other items of value.	£ _____
TOTAL ASSETS	£ _____

Liabilities – Current Value

Outstanding mortgages	£ _____
Hire purchase agreements	£ _____
Loan amounts	£ _____
Credit card balance owed	£ _____
Bank overdraft.	£ _____
Taxes owing	£ _____
Other debts	£ _____
TOTAL LIABILITIES	£ _____

Total Assets: £ _____

Less Total Liabilities: £ _____

Current Value of the Estate: £ _____