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Estate Planning Worksheet - LivingTrustBuilder

Use this worksheet to calculate the net value of your estate before estate taxes. Replace the sample data on lines 14-114 with your own information.
Your net estate is then calculated in the summary beginning on line 116. If you are married, the worksheet can subtotal the husband's & wife's separately held property, as well as property which is jointly owned. If you are single simply type the total in in column F next to the name of the asset.
After you have completed rows 14-114, skip down to the summary sheet beginning on row 108. You may need to insert additional information regarding liabilities in rows 120& 142.

Exhibit A - Trustor's Property List

Bank Accounts

Property of:
Husband/Wife or Jointly Owned

Allocation of Estate

Financial Institution	Type of Account	Value	Allocation of Estate	Child 1	Child 2	Child 3	
Bank of America	Checking	10,000	H	40%	30%	30%	100%
Bank of America	Savings	5,000	W	20%	40%	30%	100%
		0	J	0%	0%	0%	0%
		0	W	0%	60%	0%	100%
		0	W	0%	0%	0%	0%
		0	W	0%	0%	0%	0%
		15,000		\$ 5,000	\$ 5,000	\$ 5,000	100%

Cash Accounts

(Money Market, CDs, Other)

Financial Institution	Type of Account	Value	Allocation of Estate	Child 1	Child 2	Child 3	
Bank of America	Money Market	12,500	H	0%	0%	0%	0%
First Federal	CD	5,000	W	0%	0%	0%	0%
		0		0%	0%	0%	0%
		0		0%	0%	0%	0%
		0		0%	0%	0%	0%
		17,500		\$ -	\$ -	\$ -	0%

Investments

(Stocks, Bonds, Mutual Funds, Other)

Description of Investment	# Shares / Units	Value	Allocation of Estate	Child 1	Child 2	Child 3	
AT & T	500	125,000	H	0%	0%	0%	0%
Apple	50	1,300	W	0%	0%	0%	0%
Franklin Group Mutual Fund		50,000	J	0%	0%	0%	0%
		0		0%	0%	0%	0%
		0		0%	0%	0%	0%
		176,300		\$ -	\$ -	\$ -	0%

Business Interests

(Limited Partnership, etc.)

Name of Business	Type of Interest	Value	Allocation of Estate	Child 1	Child 2	Child 3	
Super Sam	Franchise-General Partnership	125,000	J	0%	0%	0%	0%

Next Estate Calculator

100%

Excel Templates For Estate Planning

Mark Steyvers



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