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Insert

Format as Table

Cell Styles

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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 128& 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	30%	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		70%	70%	30%	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%	0%	0%	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%	0%	0%	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

**C Cleary**



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## **Table of Contents Excel Templates For Estate Planning**

1. Understanding the eBook Excel Templates For Estate Planning
  - The Rise of Digital Reading Excel Templates For Estate Planning
  - Advantages of eBooks Over Traditional Books
2. Identifying Excel Templates For Estate Planning
  - Exploring Different Genres
  - Considering Fiction vs. Non-Fiction
  - Determining Your Reading Goals
3. Choosing the Right eBook Platform
  - Popular eBook Platforms
  - Features to Look for in an Excel Templates For Estate Planning
  - User-Friendly Interface
4. Exploring eBook Recommendations from Excel Templates For Estate Planning
  - Personalized Recommendations
  - Excel Templates For Estate Planning User Reviews and Ratings

- 
- Excel Templates For Estate Planning and Bestseller Lists
5. Accessing Excel Templates For Estate Planning Free and Paid eBooks
    - Excel Templates For Estate Planning Public Domain eBooks
    - Excel Templates For Estate Planning eBook Subscription Services
    - Excel Templates For Estate Planning Budget-Friendly Options
  6. Navigating Excel Templates For Estate Planning eBook Formats
    - ePub, PDF, MOBI, and More
    - Excel Templates For Estate Planning Compatibility with Devices
    - Excel Templates For Estate Planning Enhanced eBook Features
  7. Enhancing Your Reading Experience
    - Adjustable Fonts and Text Sizes of Excel Templates For Estate Planning
    - Highlighting and Note-Taking Excel Templates For Estate Planning
    - Interactive Elements Excel Templates For Estate Planning
  8. Staying Engaged with Excel Templates For Estate Planning
    - Joining Online Reading Communities
    - Participating in Virtual Book Clubs
    - Following Authors and Publishers Excel Templates For Estate Planning
  9. Balancing eBooks and Physical Books Excel Templates For Estate Planning
    - Benefits of a Digital Library
    - Creating a Diverse Reading Collection Excel Templates For Estate Planning
  10. Overcoming Reading Challenges
    - Dealing with Digital Eye Strain
    - Minimizing Distractions
    - Managing Screen Time
  11. Cultivating a Reading Routine Excel Templates For Estate Planning
    - Setting Reading Goals Excel Templates For Estate Planning
    - Carving Out Dedicated Reading Time
  12. Sourcing Reliable Information of Excel Templates For Estate Planning
    - Fact-Checking eBook Content of Excel Templates For Estate Planning
    - Distinguishing Credible Sources

- 
13. Promoting Lifelong Learning
    - Utilizing eBooks for Skill Development
    - Exploring Educational eBooks
  14. Embracing eBook Trends
    - Integration of Multimedia Elements
    - Interactive and Gamified eBooks

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