ASSETS AND LIABILITIES: To assist with your estate planning & for your personal use only.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ASSETS | Estimated $ |  | LIABILITIES | Estimated $ |
| Real Estate Address |  |  | Mortgages |  |
|  | $ |  |  | $ |
|  | $ |  |  | $ |
|  | $ |  |  | $ |
|  | $ |  |  | $ |
| Bank/Cash Investments |  |  | Bank Overdraft |  |
|  | $ |  |  | $ |
|  | $ |  |  | $ |
|  | $ |  |  | $ |
| Vehicles |  |  | Loan/lease on vehicles |  |
|  | $ |  |  | $ |
|  | $ |  |  | $ |
| Furniture and Effects |  |  | Personal Loans |  |
|  | $ |  |  | $ |
| Superannuation |  |  |  | $ |
|  | $ |  |  | $ |
|  | $ |  |  | $ |
| Interest in business, Company, Partnership or Trust |  |  | Credit Cards |  |
|  | $ |  |  | $ |
|  | $ |  |  | $ |
|  | $ |  |  | $ |
| Investments eg shares | $ |  |  | $ |
|  | $ |  |  |  |
|  |  |  |  |  |
| Other Assets |  |  | Other Liabilities |  |
|  | $ |  |  | $ |
|  | $ |  |  | $ |
|  | $ |  |  | $ |
| TOTAL |  |  | TOTAL |  |