103 Monroe St. | P.O. Box 786 | Paragould, AR 72451 | 1.877.737.0807 | 1.870.215.6210 | Fax 1.870.215.5443

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Notes

Gross Estate Calculation Form

	ASSET TYPE	VALUE
REAL ESTATE	Home	$
	Vacation Property	$
	Rental Property	$
	Land	$
	Sub Total	$
BANK ACCOUNTS	Savings	$
	Checking	$
	Money Market	$
	CDs	$
	Sub Total	$
RETIREMENT ACCOUNTS	IRA	$
	Roth IRA	$
	Keogh	$
	SEP	$
	401k	$
	Sub Total	$
INVESTMENTS	Stock Brokerage	$
	Mutual Funds	$
	Stocks in Certificate Form	$
	Bonds	$
	Annuities	$
	Money Market	$
	Limited Partnerships	$
	Promissory Notes	$
	Sub Total	$
BUSINESS OWNERSHIP	Sole Proprietorship	$
	Partnership	$
	C Corporation	$
	S Corporation	$
	Limited Liability Company	$
	Sub Total	$
PERSONAL PROPERTY	Automobiles	$
	Home Furnishings	$
	Jewelry	$
	Art	$
	Sub Total	$
INSURANCE POLICIES	Term	$
	Group	$
	Whole	$
	Universal	$
	Sub Total	$
	Gross Estate Total	$