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Self	Spouse	Child	Lawyer	Power of Attorney	Executor	Tax Preparer	Doctor	Family	Friend	Other
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This Estate Reference Guide is provided solely as an estate planning and personal recordkeeping worksheet. Information contained in this document is intended to be completed, maintained, and updated by the client. This document is not an account statement, performance report, valuation report, net worth statement, or consolidated report of assets. Any information entered into this worksheet has not been independently verified by the advisor or LPL Financial.



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Financial Accts	Real Estate	Retirement Accts	Business Interests	Insurance	Personal Property	Digital Assets	Legal Rights	Other
Bank Checking	Primary Residence	IRA	Owner	Term Life	Vehicle: Car	Cryptocurrency	Trust Interest	529 Account
Bank Savings	Rental Property	ROTH	Co-Owner	Life Insurance	Vehicle: Boat	Intellectual Property	Royalties	
CD's	Vacation Home	401(k)	Shares - Private	Life Ins (cash value)	Vehicle: RV	Website	Notes receivable	
Stocks	Land/Undeveloped	SEP	Buy/Sell agreement	Long Term Care	Vehicle: Other	Amazon Seller, etc.	Mineral/Water	
Bonds	Timeshare	Simple	Deferred Compensation	Employer Provided		Digital (PayPal/Venmo)		
Health Savings		Mutual Funds	Cash Balance Plan	Disability				
Investments		Annuity	457					

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Real Estate	Consumer Debt	Household	Medical	Business	Legal	Subscriptions	Funeral	Other
Mortgage	Credit Cards	Utilities	MyChart	Loans	Lawsuits	Streaming Services	Burial	Safe Deposit Box
Home Equity Lines	Personal Loans	Insurance	Long Term Care	Line of Credit	Alimony	Software/Cloud	Funeral	Storage Unit
Property Taxes	Auto Loans	Phone/Internet		Vendors	Child Support	Apps	Crematory	Memberships
	Vehicle Loans	Meal Kits		Lease	Settlements	Services		
	Retail Store	Amazon Subscribe		Insurance	Agreements			
	Margin Loans	Clothing (Stitch Fix)						
	Cryptocurrency loans	Clubs						

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