

Asset inventory checklist

Here's an easy-to-use estate inventory checklist to get you started

Real estate

- ☐ **Primary residence:**
Address, deed location, mortgage lender info, balance
- ☐ **Vacation homes:**
Address, deed, mortgage info
- ☐ **Rental properties:**
Address, tenant management company info, mortgage info
- ☐ **Land/plots:**
Address or legal description, deed location
- ☐ **Timeshares:**
Provider name, contract number, annual fees

Financial accounts

- ☐ **Checking accounts:**
Bank name, account number, balance, joint owners
- ☐ **Savings accounts:**
Bank name, account number, balance
- ☐ **Certificates of deposit (CDs):**
Institution, maturity date, balance
- ☐ **Money market accounts:**
Institution, balance
- ☐ **Safe deposit boxes:**
Bank location, box number, key location, contents list

Investment accounts

- ☐ **Brokerage accounts:**
Firm name, account number, types of holdings (stocks, bonds, mutual funds)
- ☐ **Retirement accounts:**
 - ☐ 401(k) / 403(b) / 457 Plans
 - ☐ Traditional IRAs
 - ☐ Roth IRAs
 - ☐ SEP IRAs / Solo 401(k)s (if self-employed)
- ☐ **Annuities:**
Insurance company, contract number, type (fixed, variable, indexed)

Insurance policies

- ☐ **Life insurance:**
 - ☐ Term life
 - ☐ Whole life / Universal life

Note: Record policy number, face value, beneficiary designations, and agent contact.
- ☐ **Health insurance:**
Provider, policy number (useful for final medical bills)
- ☐ **Disability insurance:**
Provider, policy number, benefit amount
- ☐ **Long-term care insurance:**
Provider, policy number
- ☐ **Umbrella liability insurance:**
Provider, policy number, coverage limit

Business interests

- ☐ **Sole proprietorship:**
Business name, EIN, bank accounts, inventory lists
- ☐ **Partnership:**
Partnership agreement, ownership percentage
- ☐ **LLC:**
Operating agreement, membership interest percentage
- ☐ **Corporation (S-Corp/C-Corp):**
Stock certificates, share count, bylaws
- ☐ **Franchise:**
Franchise agreement, location details

Vehicles and valuables

For each high-value item, record specific details including: Serial number, certificate of authenticity, receipts, appraisal value, and its current location.

- ☐ **Vehicles:**
Cars, trucks, motorcycles, boats, RVs, aircraft. For each, record: Make, model, year, VIN, title location
- ☐ **Jewelry:**
High-value gems, antique accessories, military pins
- ☐ **Art and collectibles:**
Paintings, sculptures, coins, stamps, rare books
- ☐ **Furs and designer goods:**
Handbags, watches, clothing
- ☐ **Electronics:**
High-end computers, audio equipment, cameras

Digital assets

- ☐ **Cryptocurrency:**
Wallet addresses, exchange accounts (Coinbase, Binance), private keys/hardware wallet location
- ☐ **Online businesses:**
E-commerce stores (Shopify, Amazon FBA), domain names
- ☐ **Social media:**
Facebook, Instagram, Twitter, LinkedIn accounts
- ☐ **Cloud storage:**
iCloud, Google Drive, Dropbox (wherever your photos/documents are stored)
- ☐ **Subscriptions:**
Streaming services, software licenses, gym memberships

Intangible assets

- ☐ **Royalties:**
Music, books, patents, trademarks
- ☐ **Loans receivable:**
Money owed to you by friends, family, or business associates
- ☐ **Membership dues:**
Country clubs, professional associations

Pre-paid plans

- ☐ **Funereal/burial plans:**
Contract details, provider contact, pre-payment status
- ☐ **Medical pre-payments:**
Any pre-paid medical expenses