

Calculating Your Gross Estate

1. If you haven't already, complete the Statement of Financial Net Worth Worksheet and input your Net Worth here \$_____.
2. List all investments that you may own an interest in and their approximate values, if these assets aren't listed on the Statement of Financial Net Worth Worksheet.

| Asset | Your Share |
|----------|------------|
| \$ _____ | _____ |
| \$ _____ | _____ |
| \$ _____ | _____ |
| \$ _____ | _____ |
| \$ _____ | _____ |

3. List all the life insurance on your life:

| | |
|----------------------------|---------------------|
| Personally owned | \$ _____ |
| Employer provided | \$ _____ |
| Association / Credit Union | \$ _____ |
| Military / Government | \$ _____ |
| Social Security | \$ <u>255</u> _____ |
| Total of Life Insurance | \$ _____ |

4. Add your Net Worth from Step 1, plus the amounts from Steps 2 and 3 to calculate your Gross Estate and enter the total here.

Total Gross Estate \$ _____