

PERSONAL ASSET INVENTORY

As Recommended By
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"Guarding Your Gold II"

A complete inventory of all your assets is of great importance when evaluating asset preservation, inheritance considerations, and Long Term Care Insurance. If your assets are even of a "modest" nature, you are a likely candidate for LTC Insurance. Please take care to complete the inventory by including and combining all of your assets, whether you are tabulating them as a couple or as an individual. Remember, we're talking about a lot of money here--yours--and ways to keep it yours.

ASSETS	VALUE	HELD JOINTLY?
1) <i>Principal Residence</i>	\$ _____	_____
2) <i>Personal belongings, household furnishings</i>	_____	_____
3) <i>Jewelry, (wedding rings, personal, etc.)</i>	_____	_____
4) <i>Fine arts, antiques, collections, etc.</i>	_____	_____
5) <i>Autos, RV's, boats, etc.</i>	_____	_____
6) <i>Secondary Residences</i>	_____	_____
7) <i>Other real estate or land</i>	_____	_____
8) <i>Marketable securities--stocks</i>	_____	_____
9) <i>Marketable bonds</i>	_____	_____
10) <i>Notes or money owed to you</i>	_____	_____
11) <i>Expected Inheritances</i>	_____	_____
12) <i>Checking Accounts</i>	_____	_____
13) <i>Saving Accounts</i>	_____	_____
14) <i>Certificates of Deposit</i>	_____	_____
15) <i>Cash Value Life Insurance</i>	_____	_____
16) <i>Annuities, IRA's, Retirement Accounts</i>	_____	_____
17) <i>Final Expense Life Insurance, burial plots</i>	_____	_____
18) <i>Trusts or trust funds in your name</i>	_____	_____
19) <i>Agricultural land</i>	_____	_____
20) <i>Business interests/ownership</i>	_____	_____
21) <i>Agricultural or business equipment</i>	_____	_____
22) <i>Agricultural or business inventory</i>	_____	_____
23) <i>Other</i>	_____	_____
 <i>TOTAL</i>	 _____	 _____