



ASSET TITLING MATRIX

CLIENT:

**DATE PREPARED:
VALUES AS OF:**

ASSET	REV. TRUST	SPOUSE TRUST	IRREV. TRUST	(HIS) PERSONAL	(HER) PERSONAL	JOINT	TOTAL
CASH/CASH EQUIVALENTS							
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SECURITIES/MUTUAL FUNDS							
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
ANNUITIES							
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
RETIREMENT PLANS							
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
REAL ESTATE (NET EQUITY)							
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
LIFE INSURANCE							
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
PERSONAL PROPERTY							
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTALS WITHOUT INSURANCE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTALS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

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