

# LAW OFFICE OF JILL A. SNYDER, LLC

PHONE: 410-864-8788  
 FAX: 410-630-5000  
 E-MAIL: JILL@SNYDER-LAW.NET  
 WWW.SNYDER-LAW.NET

LUTHERVILLE OFFICE:  
 2330 W. JOPPA ROAD, #103  
 LUTHERVILLE-TIMONIUM, MD 21093  
 410-864-8788

MAILING ADDRESS:  
 17 WINDFLOWER COURT  
 REISTERSTOWN, MD 21136

DOWNTOWN BALTIMORE OFFICE:  
 201 N. CHARLES STREET, #2000  
 BALTIMORE, MD 21201  
 410-685-0990

## Inventory of Assets

### I. Assets

#### A. REAL ESTATE

	Address	Fair Market Value	Mortgage	Owner(s)
Home	_____	\$ _____	\$ _____	_____
Other Property	_____	\$ _____	\$ _____	_____
	_____	\$ _____	\$ _____	_____

#### B. LIFE INSURANCE

Company	Policy Number	Type of Policy	Person Insured*	Beneficiary	Cash Value	Death Benefit
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

\*Please indicate if the owner is someone other than the person who is insured.

C. ACCOUNT INFORMATION

	Institution	Account Number	Approximate Value	Owner(s)	Payable on Death Designation
Checking accounts	_____	_____	\$ _____	_____	_____
	_____	_____	\$ _____	_____	_____
	_____	_____	\$ _____	_____	_____
Savings accounts	_____	_____	\$ _____	_____	_____
	_____	_____	\$ _____	_____	_____
	_____	_____	\$ _____	_____	_____
Brokerage Accounts	_____	_____	\$ _____	_____	_____
	_____	_____	\$ _____	_____	_____
	_____	_____	\$ _____	_____	_____
Custodial accounts or college savings plans	_____	_____	\$ _____	_____	_____
	_____	_____	\$ _____	_____	_____
	_____	_____	\$ _____	_____	_____
Retirement plans and accounts	_____	_____	\$ _____	_____	_____
	_____	_____	\$ _____	_____	_____
	_____	_____	\$ _____	_____	_____

D. OTHER ASSETS

Please list any other assets not named above, including cash, stocks, bonds, annuities, pension or profit-sharing plans, precious metals, jewelry, furs, antiques, collectables, automobiles, loans (for which you are a creditor), or other property or investments.

Asset	Location	Approximate Value	Owner(s)
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Do you anticipate any significant changes to your assets in the foreseeable future? Please describe. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

II. Liabilities

Creditor	Type of Debt	Amount of Debt
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____

### III. Other

A. SAFE DEPOSIT BOX: If you have a safe deposit box, please provide the location, box number, person(s) with authority to enter, location of keys, and contents. \_\_\_\_\_

---

B. GIFTS: Have you made any gifts or transfers to an individual (other than your spouse) or trust that exceed the annual gift tax exclusion? If yes, please provide details regarding the date, amount, and recipients of such gifts or transfers, and copies of any gift tax returns.

---

---

C. TRUSTS: Are you the beneficiary of any trusts? If yes, please provide copies. \_\_\_\_\_

D. OTHER INSURANCE: Do you have disability or long-term care insurance? If yes, please describe. \_\_\_\_\_

E. BUSINESSES: Do you have an ownership interest in any business? \_\_\_\_\_

If yes, please answer the following questions for each business:

What is the name of the business: \_\_\_\_\_

What is the type of business? \_\_\_\_\_

What is the corporate structure of the business (e.g., LLC, corp., sole prop.)? \_\_\_\_\_

What is the percentage of your ownership interest in the business? \_\_\_\_\_

Do you have a buy-sell agreement in place to address what happens upon your death or disability? Please provide if you would like me to review this document. \_\_\_\_\_