



# Your Asset Inventory: A Guide to Organizing Your Legacy

FREEWILL 

## A simple resource to help you take inventory of what matters most.

Taking stock of your assets ensures that your wishes are honored and your loved ones are cared for. Use this guide to list key assets, offering a clear roadmap for your family and executors. Remember to make sure your executor and/or closest loved ones know how to find this document

Disclaimer: This guide is for planning purposes only and does not  
replace legal or financial advice.

# Personal Information

## Personal Details

|                      |                                               |
|----------------------|-----------------------------------------------|
| Full name            | Date of birth                                 |
| <input type="text"/> | <input type="text"/>                          |
| Current address      |                                               |
| <input type="text"/> |                                               |
| Phone number         | Spouse or partner's full name (if applicable) |
| <input type="text"/> | <input type="text"/>                          |

## Key Contacts

### First child

|                      |                      |
|----------------------|----------------------|
| Full name            |                      |
| <input type="text"/> |                      |
| Phone number         | Email                |
| <input type="text"/> | <input type="text"/> |

### Second child

|                      |                      |
|----------------------|----------------------|
| Full name            |                      |
| <input type="text"/> |                      |
| Phone number         | Email                |
| <input type="text"/> | <input type="text"/> |

### Third child

|                      |                      |
|----------------------|----------------------|
| Full name            |                      |
| <input type="text"/> |                      |
| Phone number         | Email                |
| <input type="text"/> | <input type="text"/> |

# Key Contacts

## First sibling

Full name

Phone number

Email

## Second sibling

Full name

Phone number

Email

## Parent

Full name

Phone number

Email

## Parent

Full name

Phone number

Email

## Key Contacts

### Executor or Personal Representative

Full name

Phone number

Email

### Alternate Executor (if any)

Full name

Phone number

Email

### Agent under a Financial Power of Attorney

Full name

Phone number

Email

### Healthcare Proxy (for medical decisions)

Full name

Phone number

Email

# Assets Distributed by Your Will (Probate) or Held By Your Trust

## Bank Accounts

List bank names and types of accounts (e.g., checking, savings) solely owned by you.

### Bank Account 1

Bank name

Account number

☐ Checking   ☐ Savings   ☐ Other

Website username

Website password / PIN

### Bank Account 2

Bank name

Account number

☐ Checking   ☐ Savings   ☐ Other

Website username

Website password / PIN

### Bank Account 3

Bank name

Account number

☐ Checking   ☐ Savings   ☐ Other

Website username

Website password / PIN

### Bank Account 4

Bank name

Account number

☐ Checking   ☐ Savings   ☐ Other

Website username

Website password / PIN

## Real Estate

Include property addresses solely owned by you or co-owned.  
Note title/deed location.

## Brokerage Accounts

List investment accounts solely owned by you or held as tenants in common.

## Personal Property or Valuables

List valuable personal items (e.g., vehicles, jewelry, art, collectibles) and any business interests or other income-generating assets not held in bank or brokerage accounts. For complex assets, consider consulting a professional.

## Assets NOT Distributed By Your Will (Non-Probate)

### Jointly Owned Accounts

Any jointly owned bank or brokerage accounts listed with institution names.

### Jointly Owned Real Estate or Vehicles

Real estate or vehicles held in joint ownership; include address or vehicle information.

### Retirement Accounts

401(k), pensions, IRAs, and similar accounts with designated beneficiaries.

### Life Insurance

Include provider and primary beneficiary for each policy.

Note: These assets typically bypass your will and go directly to named beneficiaries.



# Digital Assets

Including but not limited to social media, email, cloud storage, digital devices, existing digital collections, websites or blogs you maintain, etc.

## First digital asset

|                      |                        |
|----------------------|------------------------|
| Website URL          | Website username       |
| <input type="text"/> | <input type="text"/>   |
| Account number       | Website password / PIN |
| <input type="text"/> | <input type="text"/>   |

## Second digital asset

|                      |                        |
|----------------------|------------------------|
| Website URL          | Website username       |
| <input type="text"/> | <input type="text"/>   |
| Account number       | Website password / PIN |
| <input type="text"/> | <input type="text"/>   |

## Third digital asset

|                      |                        |
|----------------------|------------------------|
| Website URL          | Website username       |
| <input type="text"/> | <input type="text"/>   |
| Account number       | Website password / PIN |
| <input type="text"/> | <input type="text"/>   |

## Fourth digital asset

|                      |                        |
|----------------------|------------------------|
| Website URL          | Website username       |
| <input type="text"/> | <input type="text"/>   |
| Account number       | Website password / PIN |
| <input type="text"/> | <input type="text"/>   |

# Liabilities

## Major Liabilities

Mortgage(s), Loans, or Debts. Provide a high-level overview, including mortgage or loan providers' names and approximate balances (e.g., home mortgage, auto loan).

## Credit Cards and Other Obligations

Briefly list significant credit card balances or recurring financial obligations (specific account numbers and balances are unnecessary).

# Estate Planning Documents

## Will or Trust Information

Location of your will or trust document and date of the last update.

Estate planning attorney’s contact information (if applicable).

## Health Care Documents

Include provider and primary beneficiary for each policy.  
Note: These assets typically bypass your will and go directly to named beneficiaries.

## Financial Power of Attorney

Name of the appointed agent for financial matters, with contact details.

# End-of-Life Preferences & Charitable Wishes

Summary of funeral preferences (e.g., burial, cremation, music selections, scriptures)

Location of any burial plots owned

List any specific charities you'd like to support through your memorial gifts

# Summary

## Total Asset Estimate

High-level summary of total estimated assets and liabilities

Congratulations on completing this important step!

A clear asset inventory provides peace of mind and helps ensure your loved ones have the guidance they need. You should review and update this document and your estate plan every 3-5 years.