



Asset Alignment Guide:

Organize your assets to give your loved ones confidence and security.

Accounts

Type of Account (Checking, Savings, CD, Money Market, Brokerage, 401k, IRA, 529, etc.)	Institution	Owner	Joint Owner(s)	Named Beneficiaries	Aligned with Estate Plan (Y/N)

Cryptocurrency Holdings

Type of Cryptocurrency (Bitcoin, Ethereum, Solana, Dogecoin, etc.)	Wallet Type (Hot, Cold, Custodial, Exchange Account, Paper Wallet)	Where is it Stored? (Exchange Name, App, Device, Safety Deposit Box)	Access Instructions (Who Can Access? Location?)	Aligned with Estate Plan (Y/N)

Business Interests

Business Name	Type of Ownership (Sole Proprietor, LLC, Partnership, etc.)	Percent of Ownership	Operating or Buy-Sell Agreement (Do your business documents include succession or transfer provisions?)	Aligned with Estate Plan (Y/N)

Life Insurance Policies

Insurance Company	Policy Type (Term, Whole, Group)	Owner	Beneficiary(ies)	Contingent Beneficiary(ies)	Aligned with Estate Plan (Y/N)

Real Estate

Property Address	Owner	Joint Owner(s)	Mortgage	Aligned with Estate Plan (Y/N)

High Value Personal Property

(Jewelry, Heirlooms, Collectibles)

Item Description	Insured By	Policy Information	Intended Recipient	Listed in a Will or Personal Property Memorandum (Y/N)

Legal Disclaimer

This Asset Alignment Guide is intended solely for informational and educational purposes and does not constitute legal advice. No attorney-client relationship is created through the use or access of this Asset Alignment Guide. This Asset Alignment Guide is provided as a general guide only, does not create or constitute a legal document, and has no legal effect. Users with specific legal questions or issues are strongly encouraged to consult with a licensed attorney in their jurisdiction. This Asset Alignment Guide is provided “as is” without any representations or warranties, express or implied, and the author makes no warranty as to the accuracy, completeness, or suitability of the information contained. In no event shall the author, or any affiliated parties, be liable for any damages arising out of or in connection with the use of or reliance of this Asset Alignment Guide. This disclaimer is governed by and construed in accordance with the laws of the State of Alabama, without regard to its conflict of law provisions.