



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)

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

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