



CONFIDENTIAL

ESTATE PLANNING QUESTIONNAIRE  
MISCELLANEOUS ASSETS OF SIGNIFICANT VALUE WORKSHEET

Date: \_\_\_\_\_

CLIENT 1 NAME	
CLIENT 2 NAME	

ABOUT THIS WORKSHEET

This is a supplementary worksheet to the Syntero Group *Estate Planning Questionnaire*. Please list any additional assets of significant value you own that do not fall into the other categories listed in the other worksheets and you would like accounted for in your Estate Plan. Miscellaneous assets may include: coin collections, vintage automobiles, jewelry, etc.

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Type of Asset	
Description of Asset	
Estimated Value	\$
Owned by	<input type="checkbox"/> Client 1 <input type="checkbox"/> Client 2 <input type="checkbox"/> Other:
Beneficiary or Beneficiaries	

#

Type of Asset	
Description of Asset	
Estimated Value	\$
Owned by	<input type="checkbox"/> Client 1 <input type="checkbox"/> Client 2 <input type="checkbox"/> Other:
Beneficiary or Beneficiaries	

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Owned by	<input type="checkbox"/> Client 1 <input type="checkbox"/> Client 2 <input type="checkbox"/> Other:
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