

**LIST OF HOW TITLE TO PROPERTY IS HELD FOR
YOUR ESTATE PLAN**

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AS PART OF YOUR ESTATE PLAN, YOU SHOULD REVIEW HOW YOU HOLD TITLE TO THE ASSETS THAT YOU OWN. THIS FORM WILL ASSIST YOU IN REVIEWING HOW YOU HOLD TITLE TO ALL OF YOUR ASSETS.

1. For all **bank accounts and certificates of deposit**, list who the owners are and how the title is held (single name, joint tenancy, POD- payable on death, other- specify)

<u>Description of bank account or CD</u>	<u>How title is held</u>
_____	_____
_____	_____
_____	_____

2. For all **brokerage accounts**, list who the owners are and how the title is held (single name, joint tenancy, POD- payable on death, other- specify)

<u>Description of brokerage account</u>	<u>How title is held</u>
_____	_____
_____	_____
_____	_____

3. For all **mutual funds**, list who the owners are and how the title is held (single name, joint tenancy, POD- payable on death, other- specify)

<u>Description of mutual fund</u>	<u>How title is held</u>
_____	_____
_____	_____
_____	_____

4. For all **stocks and bonds**, list who the owners are and how the title is held (single name, joint tenancy, POD- payable on death, other- specify)

<u>Description of stock or bond</u>	<u>How title is held</u>
_____	_____
_____	_____
_____	_____

5. For all **U.S. savings bonds**, list who the owners are and how the title is held (single name, joint tenancy, POD- payable on death, other- specify)

<u>Description of bond</u>	<u>How title is held</u>
_____	_____
_____	_____
_____	_____

6. For all **real estate**, list how the title is held (single name, joint tenancy, tenancy in common, other- specify)

<u>Address of property</u>	<u>How title is held</u>
_____	_____
_____	_____
_____	_____

7. For all **vehicles**, list how the title is held (single name, joint tenancy, other- specify)

<u>Description of vehicle</u>	<u>How title is held</u>
_____	_____
_____	_____
_____	_____