Worksheet 1: Forest Property and Estate Overview

**Real Estate**

Description and location:

Description and location:

Parcel/tax lot #: Zoning/easement: Date, how acquired: / How owned:

% ownership: % Basis: $ Debt obligation: $

Parcel/tax lot #: Zoning/easement: Date, how acquired: / How owned:

% ownership: % Basis: $ Debt obligation: $

Description and location:

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Parcel/tax lot #: Zoning/easement: Date, how acquired: / How owned:

% ownership: % Basis: $ Debt obligation: $

**Buildings**

Description, address:

Description, address:

Parcel/tax lot #: Zoning/easement: Date, how acquired: How owned:

% ownership interest: % Basis: $

Debt obligation $

Parcel/tax lot #: Zoning/easement: Date, how acquired: How owned:

% ownership interest: % Basis: $

Debt obligation $

Description, address:

Description, address:

Parcel/tax lot #: Zoning/easement: Date, how acquired: How owned:

% ownership interest: % Basis: $

Debt obligation $

Parcel/tax lot #: Zoning/easement: Date, how acquired: How owned:

% ownership interest: % Basis: $

Debt obligation $

Worksheet 1: Forest Property and Estate Overview (continued)

**Timber**

Description: Stand #: Est. value:

Valuation date:

Description: Stand #: Est. value:

Valuation date:

Description: Stand #: Est. value:

Valuation date:

Description: Stand #: Est. value:

Valuation date:

**Bank accounts**

Savings Account:

Account Number Bank or Company Balance

$

Checking Account:

Account Number Bank or Company Balance

$

Certificate of Deposit:

Account Number Bank or Company Balance

$

Total: $

**Mutual Funds**

Company Fund type: No. of shares date acquired purchase price current value

$ $

**Life Insurance**

Company Policy no.: Owner beneficiary value

$

**Retirement/Employee Benefits**

IRAs

Account Number Bank or Company Plan Owner Beneficiary Balance

$

Worksheet 1: Forest Property and Estate Overview (continued)

**Motor and Recreational Vehicles** Item: Year/Make/Model: Title Holder: Purchase cost: $ Purchase date: Estimated Fair Market Value: $ Appraised Value: $ Debt Obligation: $ Valuation Date:

Item: Year/Make/Model: Title Holder: Purchase cost: $ Purchase date: Estimated Fair Market Value: $ Appraised Value: $ Debt Obligation: $ Valuation Date:

**Machinery and Equipment**

Item:

Year/Make/Model: Purchase cost and date: $ , Estimated Fair Market Value: $ Appraised Value: $ Debt Obligation: $ Valuation Date:

Item:

Year/Make/Model: Purchase cost and date: $ , Estimated Fair Market Value: $ Appraised Value: $ Debt Obligation: $ Valuation Date:

**All Household and Tools**

Estimated Fair Market Value: $

**Jewelry/Gems/Precious Metals** Item: Description: Purchase Date: Original Cost: $

Estimated Fair Market Value: $

Item: Description: Purchase Date: Original Cost: $ Estimated Fair Market Value: $