

Worksheet 1: Forest Property and Estate Overview

Real Estate

Description and location: _____

Description and location: _____

Parcel/tax lot #: _____

Parcel/tax lot #: _____

Zoning/easement: _____

Zoning/easement: _____

Date, how acquired: _____ / _____

Date, how acquired: _____ / _____

How owned: _____

How owned: _____

% ownership: _____%

% ownership: _____%

Basis: \$ _____

Basis: \$ _____

Debt obligation: \$ _____

Debt obligation: \$ _____

Description and location: _____

Description and location: _____

Parcel/tax lot #: _____

Parcel/tax lot #: _____

Zoning/easement: _____

Zoning/easement: _____

Date, how acquired: _____ / _____

Date, how acquired: _____ / _____

How owned: _____

How owned: _____

% ownership: _____%

% ownership: _____%

Basis: \$ _____

Basis: \$ _____

Debt obligation: \$ _____

Debt obligation: \$ _____

Buildings

Description, address: _____

Description, address: _____

Parcel/tax lot #: _____

Parcel/tax lot #: _____

Zoning/easement: _____

Zoning/easement: _____

Date, how acquired: _____

Date, how acquired: _____

How owned: _____

How owned: _____

% ownership interest: _____%

% ownership interest: _____%

Basis: \$ _____

Basis: \$ _____

Debt obligation \$ _____

Debt obligation \$ _____

Description, address: _____

Description, address: _____

Parcel/tax lot #: _____

Parcel/tax lot #: _____

Zoning/easement: _____

Zoning/easement: _____

Date, how acquired: _____

Date, how acquired: _____

How owned: _____

How owned: _____

% ownership interest: _____%

% ownership interest: _____%

Basis: \$ _____

Basis: \$ _____

Debt obligation \$ _____

Debt obligation \$ _____

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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: \$ _____

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