



MAZENKO LAW FIRM

WILLS, TRUSTS, PROBATE, AND MEDICAID PLANNING

TODD MAZENKO
1502 N. DONNELLY STREET
SUITE 106
MOUNT DORA, FL 32757

VOICE: (352) 565-7737
FAX: (352) 565-7737

Asset Inventory

Please indicate ownership, location, and estimated value of the following assets. Please attach a separate list if more space is needed. All information provided will remain confidential.

Table with 4 columns: Location, Titling, Fair Market Value, Mortgage Amount. Includes a Total Value row.

Table with 4 columns: Financial Institution, Titling, Value, Beneficiary. Includes a Total Value row.

Individual Retirement Accounts and 401(k)s			
Financial Institution	Titling	Value	Beneficiary
1.		\$	1. 2. 3. 4.
2.		\$	1. 2. 3. 4.
3.		\$	1. 2. 3. 4.
4.		\$	1. 2. 3. 4.
Total Value: \$			

Stocks and Bonds			
Financial Institution	Titling	Value	Beneficiary
1.		\$	1. 2. 3. 4.
2.		\$	1. 2. 3. 4.
3.		\$	1. 2. 3. 4.
4.		\$	1. 2. 3. 4.
Total Value: \$			

Life Insurance			
Financial Institution	Policy Owner	Value	Beneficiary
1.		\$	1. 2. 3. 4.
2.		\$	1. 2. 3. 4.
3.		\$	1. 2. 3. 4.
4.		\$	1. 2. 3. 4.
Total Value: \$			

Annuities			
Financial Institution	Policy Owner	Value	Beneficiary
1.		\$	1. 2. 3. 4.
2.		\$	1. 2. 3. 4.
3.		\$	1. 2. 3. 4.
4.		\$	1. 2. 3. 4.
Total Value: \$			