

# How Much Do You Have In Assets?

Not having all your assets covered could cost you a fortune. Umbrella's are low in cost and can fill in the coverage gaps that your underlying liability coverage will not cover. To find out how much you should have in coverage, you should first identify your assets. Use this sheet as a guide!

## Assets

### CASH

Checking \_\_\_\_\_  
Savings \_\_\_\_\_  
Certificates of Deposit \_\_\_\_\_  
Life Insurance Cash Value \_\_\_\_\_  
Other \_\_\_\_\_

### INVESTMENTS

Mutual Funds \_\_\_\_\_  
Stocks \_\_\_\_\_  
Bonds \_\_\_\_\_  
Treasury Bills \_\_\_\_\_  
Other \_\_\_\_\_

### PERSONAL

Real Estate \_\_\_\_\_  
Car(s) \_\_\_\_\_  
Art & Collectibles \_\_\_\_\_  
Jewelry \_\_\_\_\_  
Furnishings \_\_\_\_\_  
Other \_\_\_\_\_

### RETIREMENT

Pension Value (today) \_\_\_\_\_  
Tax-Deferred Accounts \_\_\_\_\_

FUTURE EARNINGS: \_\_\_\_\_

TOTAL ASSETS: \_\_\_\_\_

Total Assets \_\_\_\_\_

Auto Liability Limit \_\_\_\_\_

Assets-Auto Liability Limit = \_\_\_\_\_

Uninsured Assets: \_\_\_\_\_

Total Assets \_\_\_\_\_

Homeowner Liability Limit \_\_\_\_\_

Assets-Homeowner Liability = \_\_\_\_\_

Uninsured Assets: \_\_\_\_\_