

California family asset worksheet

Family Estate Guide • September 14, 2026

Use this privately to organize a current estate or your own plan. Do not include full account numbers, passwords, or Social Security numbers. This worksheet does not determine eligibility or replace a court filing.

Purpose: ☐ Settling an estate ☐ Planning ahead Date prepared: _____

Owner / deceased person's name: _____

Date of death, if applicable: _____ County of domicile: _____

1. List assets and the evidence of ownership

Asset / institution	Title / owner	Beneficiary or trust evidence	Value and date

Mark uncertain ownership or beneficiary information as unconfirmed. A will or family recollection alone may not establish the transfer route.

2. Locate the documents

☐ Will ☐ Trust and amendments ☐ Recorded deed ☐ Account statements

☐ Beneficiary confirmations ☐ Death certificates ☐ Mortgage and tax records

Stored at / person to contact:

California: questions and next steps

Record the date of death before checking affidavit or primary-residence petition limits. Keep the original will, recorded deeds, and trust documents together. A TOD deed has its own after-death notice and recording work.

3. Confirm the route for each asset

Asset	Possible route / unanswered question	Who will confirm it?

Possible routes to investigate: beneficiary claim, survivorship, trust administration, deed transfer, simplified court procedure, or formal probate. Do not treat this list as an eligibility decision.

4. Track obligations and work

Bill, deadline, or task	Source / date / responsible person

Record who paid each expense and keep receipts. Confirm authority before moving or distributing estate funds.

5. Bring these questions to the next conversation

Which records are missing? Which assets need court administration? Who has authority to act? What notices, filing dates, fees, or title issues apply? If planning ahead, who should manage assets during incapacity or for a beneficiary?

State guide: familyestateguide.com/california-estate-planning/

Official starting point: [California Courts probate self-help](#)

Keep this worksheet with your private records. No submission or email signup is required.