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Gross Taxable Estate

Probate Estate

Your Probate Estate is comprised of your "Probate Assets" – those assets that pass to your beneficiaries through your Will.

Examples of Probate Assets include:

- Solely owned vehicles
- Individually owned bank accounts
- Real property owned as "Tenants in Common"
- Life insurance policies, 401(k)s, or IRAs with no beneficiary designation

Non-Probate Estate

Your Non-probate Estate is comprised of your "Non-probate Assets" – those that pass "outside of" your will, through rights of survivorship or a beneficiary designation.

Examples of Non-probate Assets include:

- Real property held by two individuals as joint tenants with rights of survivorship
- A jointly held bank account
- Life insurance policies, 401(k)s, or IRAs with a named beneficiary