



# Financial Overview

Assets \_\_\_\_\_

- Checking Account \_\_\_\_\_
- Savings Account \_\_\_\_\_
- Investments (Stocks, bonds, etc.) \_\_\_\_\_
- Cash Value of Life Insurance \_\_\_\_\_
- Real Estate (Home and any rentals) \_\_\_\_\_
- Business Value \_\_\_\_\_
- Vehicles \_\_\_\_\_
- Personal Property (Furniture, Jewelry, etc.) \_\_\_\_\_
- Retirement (401k, IRA, pension, etc.) \_\_\_\_\_
- Other \_\_\_\_\_

Liabilities \_\_\_\_\_

- Credit Card Debt \_\_\_\_\_
- Automobile Loans \_\_\_\_\_
- Mortgages \_\_\_\_\_
- Business Loans \_\_\_\_\_
- Education Loans \_\_\_\_\_
- Past Due Bills \_\_\_\_\_
- Other Liabilities \_\_\_\_\_

Net Worth \_\_\_\_\_

(Assets - Liabilities =)