

FINANCIAL OVERVIEW

1. Assets:

Checking Account	\$ _____
Savings Account	\$ _____
Investments (Stocks, Mutual Funds, etc)	\$ _____
Cash on hand	\$ _____
Real Estate (Home and Rentals)	\$ _____
Business Value	\$ _____
Vehicles	\$ _____
Property (Jewelry, boat, ATV, etc)	\$ _____
Retirement Accounts	\$ _____
Other (specify) _____	\$ _____
Other (specify) _____	\$ _____
Other (specify) _____	\$ _____

Total Assets

\$ _____

2. Liabilities:

Credit Card Debt	\$ _____
Car Loans	\$ _____
Mortgages	\$ _____
Lines of Credit	\$ _____
Business Loans	\$ _____
Student Loans	\$ _____
Boat/RV Loan	\$ _____
Past Due Bills	\$ _____
Medical Debt	\$ _____
Subscriptions	\$ _____
Other (specify) _____	\$ _____
Other (specify) _____	\$ _____
Other (specify) _____	\$ _____

Total Liabilities

\$ _____

3. Net Worth:

(Assets-Liabilities)

\$ _____

