

Name: _____

Date: _____

Assets

Current Assets

Cash _____
Stocks and Bonds _____
CD's (1 yr. or less) _____
Total Current Assets _____

Long-Term Assets

CD's (More than 1 yr) _____
Retirement Accounts _____
Personal Residence _____
Second Residence _____
Real Estate Investments _____
Other Long-Term Assets _____
Total Long-Term Assets _____

Personal Property

Automobiles _____
Art _____
Jewelry _____
Tools and Equipment _____
Other Personal Property _____
Total Personal Property _____

Total Assets _____

Liabilities

Current Liabilities

Current Bills (Utilities, etc) _____
Rent / Mortgage Payment _____
Car Payments _____
Other Loan Payments _____
Credit Card Balances _____
Total Current Liabilities _____

Long-Term Liabilities

Mortgage Balance _____
Second Residence Mortgage _____
Car Loan Balances _____
Other Loan Balances _____
Total Long-Term Liabilities _____

Total Liabilities _____

Total Net Worth _____

Total Liabilities and Net Worth _____