

Know Where You Stand Today

Personal Balance Sheet:

Assets:	Total:
Banks, Credit Unions, Cash	
Investments (taxable)	
Investments (taxable)	
Retirement Plans	
Retirement Plans	
Benefit Plans (pensions)	
Benefit Plans (taxable)	
Real Estate	
Personal Assets	
Miscellaneous	
Liabilities:	
Credit Card Debt	
Consumer Debt (auto)	
Home Mortgage	
Other Mortgage	
Home Equity Loans, HELOCS	
Student Loans	
Loans against life insurance or 401K	
Other	
Other	
Net Worth (Total Assets minus Total Liabilities):	
Other Assets:	
College Savings Plans	
Trust Accounts	
Cash Value of Life Insurance	
Other	
Total Other Assets:	
Cash Inflows:	

Partner "A"	
Partner "B"	
Interest Income from CD's, money mkts	
Dividend Income from taxable accounts	
Rental Income	
Annuity Payments	
Trust Income	
Social Security Income	
Pension Payments	
IRA Income (required over age 70)	
Other	
Total Income:	

1. What do I own? \$ _____
2. What do I owe? \$ _____
3. How much do I make? \$ _____