



## 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 =)