

# PERSONAL FINANCIAL SNAPSHOT

## WHAT WE OWN

### Assets Productive

Cash in Banks	\$_____
Mutual Funds Investments	\$_____
IRA Husband	\$_____
IRA Wife	\$_____
Retirement Account 401(k)	\$_____
Cash Value Life Insurance	\$_____
Business Owner's Value	\$_____
	_____
Total Productive Assets	\$_____

### Assets Personal

Residence	\$_____
Home Furnishings	\$_____
Jewelry	\$_____
Automobiles	\$_____
Boat	\$_____
Motorcycle	\$_____
	_____
Total Personal Assets	\$_____

Total Assets \$\_\_\_\_\_

## WHAT WE OWE

### Liabilities

Home Mortgage	
First Mortgage	\$_____
Home Equity Loan	\$_____
Car Loan	\$_____
Car Loan	\$_____
Credit Cards	\$_____
Other Debt	\$_____
	_____
Total Liabilities	\$_____

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