

Assets (What You Own)	<i>Current Value</i>		
	Self	Spouse	Total
CHECKING ACCOUNTS	\$ _____	\$ _____	\$ _____
SAVINGS ACCOUNTS	\$ _____	\$ _____	\$ _____
MONEY MARKET ACCOUNTS/FUNDS	\$ _____	\$ _____	\$ _____
CERTIFICATES OF DEPOSIT	\$ _____	\$ _____	\$ _____
IRA ACCOUNTS	\$ _____	\$ _____	\$ _____
KEOUGH ACCOUNTS	\$ _____	\$ _____	\$ _____
OTHER RETIREMENT ACCOUNTS	\$ _____	\$ _____	\$ _____
PENSION/PROFIT SHARING	\$ _____	\$ _____	\$ _____
LIFE INSURANCE CASH VALUES	\$ _____	\$ _____	\$ _____
ANNUITIES	\$ _____	\$ _____	\$ _____
BONDS	\$ _____	\$ _____	\$ _____
MUTUAL FUNDS	\$ _____	\$ _____	\$ _____
STOCKS	\$ _____	\$ _____	\$ _____
OTHER SECURITIES	\$ _____	\$ _____	\$ _____
HOME	\$ _____	\$ _____	\$ _____
OTHER REAL ESTATE	\$ _____	\$ _____	\$ _____
AUTOMOBILES	\$ _____	\$ _____	\$ _____
OTHER PERSONAL PROPERTY:	\$ _____	\$ _____	\$ _____
(Furnishings, jewelry, etc.)	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
MONEY OWED TO YOU	\$ _____	\$ _____	\$ _____
OTHER ASSETS:	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
TOTAL ASSETS	\$ _____	\$ _____	\$ _____

Current Value

Liabilities (what you owe)	Self	Spouse	Total
HOME MORTGAGE	\$ _____	\$ _____	\$ _____
OTHER MORTGAGES	\$ _____	\$ _____	\$ _____
AUTOMOBILE LOANS	\$ _____	\$ _____	\$ _____
CREDIT CARD BALANCES	\$ _____	\$ _____	\$ _____
INSTALLMENT ACCOUNTS	\$ _____	\$ _____	\$ _____
CONTRACTS/MONEY BORROWED	\$ _____	\$ _____	\$ _____
INCOME TAXES	\$ _____	\$ _____	\$ _____
OTHER: _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
TOTAL LIABILITIES	\$ _____	\$ _____	\$ _____
TOTAL ASSETS (from previous page)	\$ _____	\$ _____	\$ _____
LESS LIABILITIES (from above)	- \$ _____	- \$ _____	- \$ _____
NET WORTH (assets minus liabilities)	\$ _____	\$ _____	\$ _____

DATE: _____