



BALANCE SHEET



Fixed Assets (Current Sales Value)

Primary Residence

\$

Second Home

\$

Car(s)

\$

Collectibles

\$

Boats

\$

Liquid Assets

**Personal Investments
(stocks, bonds, cash, etc.)**

\$

Retirement Accounts

\$

Cash Value Life Insurance

\$

Deferred Annuities

\$

Fixed Debts

Mortgage Primary Residence

\$

Mortgage Second Home

\$

Home Equity Loan(s)

\$

Auto Loan(s)

\$

Other Debts

Credit Card Debts

\$

Other Obligations

\$