

Assets & Liabilities	
Date:	August 12, 2024

ASSETS (Present Market Value)
Cash On Hand (both husband and wife if married)
Checking Accounts
Savings Accounts
HSA / FSA Accounts
Stocks and Bonds
Cash Value of Life Insurance
Valuable Collections (coins, stamps, etc.)
Primary Home Value (look up value, e.g., zillow.com)
Other Real Estate
Mortgages/Notes Receivable
Automobile 1 (look up value, e.g., kbb.com)
Automobile 2 (look up value, e.g., kbb.com)
Automobile 3 (look up value, e.g., kbb.com)
Personal Property (Furniture, Jewelry, etc.)
Retirement Savings (401k, 403b, IRAs, Pension, etc.)
College Savings
Other Assets
Total Assets

LIABILITIES / DEBT LIST				
CREDIT CARDS (only list cards for which you do not pay the full statement balance each month)				
Credit Card Issuer	What Was Purchased	Minimum Monthly Payment	Interest Rate	Months Past Due
Brightstar		100.00	3.99%	0
Chase		150.00	0.00%	
Bank of America		100.00	0.00%	0
			0.00%	
BRANDMART		100.00		
Total Credit Cards		450		

AUTO LOANS				
Loan Company	Year, Make, Model	Minimum Monthly Payment	Interest Rate	Months Past Due
HONDA	HONDA CRV 2020	411.00		0
BRAIGHTSTAR	HONDA ACCORD 2021	396.81		0
Total Auto Loans		808		

HOME MORTGAGES (includes home equity loans or lines of credit)				
Mortgage Service Company	Property Address	Minimum Monthly Payment	Interest Rate	Months Past Due
LENDING MORTGAGE	23290 SW 58TH AVE	1,668.00	3.38%	0

