

Assets & Liabilities

Date: _____

ASSETS (Present Market Value)		Balance
Cash On Hand (both husband and wife if married)		0
Checking Accounts		270
Savings Accounts		80
HSA / FSA Accounts		0
Stocks and Bonds		0
Cash Value of Life Insurance		Don't know
Valuable Collections (coins, stamps, etc.)		0
Primary Home Value (look up value, e.g., zillow.com)		0
Other Real Estate		0
Mortgages/Notes Receivable		0
Automobile 1 (look up value, e.g., kbb.com)		2,000
Automobile 2 (look up value, e.g., kbb.com)		0
Automobile 3 (look up value, e.g., kbb.com)		0
Personal Property (Furniture, Jewelry, etc.)		2,000
Retirement Savings (401k, 403b, IRAs, Pension, etc.)		80,000
College Savings		0
Other Assets		0
Total Assets		84,350

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	Balance Due
Visa	bills	175.00	30.00%	0	4,800.00
Total Credit Cards		175			4,800
AUTO LOANS					
Loan Company	Year, Make, Model	Minimum Monthly Payment	Interest Rate	Months Past Due	Balance Due
53rd bank	2018 Toyato CHR	250.00	3.50%	0	2,517.00

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Total Auto Loans		250			2,517
HOME MORTGAGES (includes home equity loans or lines of credit)					
Mortgage Service Company	Property Address	Minimum Monthly Payment	Interest Rate	Months Past Due	Balance Due
Total Home Mortgages		0			0
OTHER DEBT (education, medical, personal, business, legal, IRS, etc.)					
Who	Type of Debt (medical, education, etc.)	Minimum Monthly Payment	Interest Rate	Months Past Due	Balance Due
Total Other Debt		0			0
Total Liabilities/Debts					7,317
NET WORTH (Total Assets minus Total Liabilities/Debts)					77,033

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