

## Creating a Personal Financial Snapshot

### ASSETS *(What you own)*

*Amount in dollars*

#### Real Estate

House at market value \$ \_\_\_\_\_  
Other real estate \$ \_\_\_\_\_

#### Cash & Securities

Checking accounts \$ \_\_\_\_\_  
Savings accounts \$ \_\_\_\_\_  
Certificate of deposits \$ \_\_\_\_\_  
Securities: stock, bonds, mutual funds \$ \_\_\_\_\_  
Life insurance (cash surrender value) \$ \_\_\_\_\_

#### Tangible Personal Property

Automobiles \$ \_\_\_\_\_  
Jewelry \$ \_\_\_\_\_  
Recreational vehicles \$ \_\_\_\_\_  
Other: \$ \_\_\_\_\_

**Total Assets** *(Real Estate + Cash / Securities + Tangible + Other)* \$ \_\_\_\_\_

### LIABILITIES *(What you owe)*

#### Current credit card debt

card #1 \$ \_\_\_\_\_  
card #2 \$ \_\_\_\_\_  
card #3 \$ \_\_\_\_\_  
card #4 \$ \_\_\_\_\_  
card #5 \$ \_\_\_\_\_

#### Notes payable

Education loans \$ \_\_\_\_\_  
Home equity loan \$ \_\_\_\_\_  
Other: \$ \_\_\_\_\_

#### Automobile loans

\$ \_\_\_\_\_

#### Real estate mortgage

\$ \_\_\_\_\_

#### Other liabilities

\$ \_\_\_\_\_

**Total Liabilities** *(Credit + Notes + Auto + Mortgage + Other)* \$ \_\_\_\_\_

<b>FINANCIAL SNAPSHOT</b> <i>(Total Assets – Total Liabilities):</i> \$ _____
---