

BALANCED BUDGET, BALANCED LIFE

## Net Worth Worksheet

Assets			Market Value
	Cash		
		Cash on Hand	
		Checking and Savings	
		Certificates of Deposit (CD)	
		Cash Value of Life Insurance	
Investment and Retirement			
		Stocks and Bonds	
		Mutual Funds	
		Pension	
		IRA / 401K / 403B	
		529 College Savings	
	Property		
		Principle Residence	
		Second Residence	
		Home Furnishings	
		Automobiles	
		Collectibles	
		Jewelry	
	Other		
Total Assets			

Liabilities			Amount Owed
	Unsecured Debt		
		Credit Cards	
		Charge Accounts	
		Student Loans	
		Alimony / Child Support	

## APPENDIX B: WORKSHEETS

Liabilities cont'd			Amount Owed
		Unpaid Taxes	
		Other	
	Secured Debt		
		Home Mortgage	
		Home Equity Loans	
		Auto Loans	
		Boats / RVs / Campers	
		Other	
Total Liabilities			
Net Worth (Assets Minus Liabilities)			

## Financial Goals Worksheet

[illegible]