

Date \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_ Phone Number: \_\_\_\_\_

## Balance Sheet

**Property Assets**

Residence \_\_\_\_\_

Vacation home \_\_\_\_\_

Furnishings \_\_\_\_\_

Jewelry and art \_\_\_\_\_

Automobiles \_\_\_\_\_

Other \_\_\_\_\_

**Equity Assets** \_\_\_\_\_

Real estate \_\_\_\_\_

Stocks \_\_\_\_\_

Bonds \_\_\_\_\_

Mutual funds \_\_\_\_\_

Annuities \_\_\_\_\_

Business equity \_\_\_\_\_

**Cash Reserve Assets** \_\_\_\_\_

Checking account \_\_\_\_\_

Savings account \_\_\_\_\_

CDs \_\_\_\_\_

Money market \_\_\_\_\_

Other \_\_\_\_\_

**Total Assets** \_\_\_\_\_

**Liabilities**

Home mortgage \_\_\_\_\_

Other mortgage \_\_\_\_\_

Bank loans \_\_\_\_\_

Auto loans \_\_\_\_\_

Credit cards \_\_\_\_\_

Personal loans \_\_\_\_\_

Other \_\_\_\_\_

**Total Liabilities** \_\_\_\_\_

**Summary**

Total Assets \_\_\_\_\_

Total Liabilities \_\_\_\_\_

**Net Worth** \_\_\_\_\_

**Notes- Contingent Liabilities:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I certify this balance sheet to be true and accurate.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_