

Balance Sheet

Assets:

Bank Accounts

Checking \$ _____
 Savings \$ _____
 CDs \$ _____

Retirement Accounts

IRAs \$ _____
 Roth IRAs \$ _____
 401(k)s \$ _____
 403(b)s \$ _____

**Non Retirement
Investments**

Brokerage Accounts \$ _____
 Annuities \$ _____
 Real Estate \$ _____
 Collectibles \$ _____

Total Assets \$ _____

Liabilities:

Mortgage \$ _____
 Auto Loans \$ _____
 Credit Card \$ _____
 Other Debt \$ _____

Total Debt \$ _____

Net Worth \$ _____