



Name(s) _____

Date _____

ASSETS and INCOME

(Determine Market Value by just giving your best guess as to what your assets are worth)

MARKET VALUE

PERSONAL PROPERTY

- Residence..... _____
- Contents/Furnishings: antiques, art, china, clothing, collections/collectibles (coins/stamps, dolls, figurines, etc), furniture, furs, jewelry, silver cutlery, sporting goods, etc

- Vehicle(s): auto/truck/van, boat, camper, jet ski, motorcycle, RV, tractor, etc

<u>YEAR</u>	<u>MAKE/MODEL</u>	<u>MILEAGE</u>	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

CASH

Cash on hand.....	_____
Checking Account balance.....	_____
Savings Account balance.....	_____
Credit Union.....	_____
Money Market funds.....	_____
Other.....	_____

INVESTMENTS

CDs (Certificates of Deposit).....	_____
Mutual Funds.....	_____
Stocks/Bonds/Savings Bonds.....	_____
Real Estate: land, rentals, etc.....	_____
Tangibles: gold, silver, etc.....	_____
Other.....	_____

RETIREMENT ASSETS

IRA (Individual Retirement Account)...	_____
Company Plan (ex. 401k).....	_____
Keogh/TSA (Tax Sheltered Annuity)...	_____
Profit-Sharing Plan.....	_____
Other.....	_____

MISCELLANEOUS

Business Valuation/Equity.....	_____
Cash Value of Life Insurance.....	_____
Pets.....	_____
Receivables (amounts owed to you).....	_____
Other.....	_____

PERSONAL INCOME

GROSS INCOME (this year) – How much you expect to make before taxes or any other deductions:

Husband \$ _____ Wife \$ _____ Children \$ _____ TOTAL \$ _____

NET INCOME – How much you receive in your pay check:

<u>WHO</u> (husband, wife)	<u>SOURCE</u> (company)	<u>PAY PERIOD</u> (week, two weeks, etc)	<u>AVG AMT OF</u> <u>PAY CHECK</u>
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____