

Personal Balance Sheet

Name:

Date:

Assets	Amount*
Checking Account	\$ _____
Savings Account	_____
Non-Retirement Investments	_____
_____	_____
_____	_____
_____	_____
_____	_____
Subtotal Current Assets	_____
Retirement Investments	
_____	_____
_____	_____
_____	_____
_____	_____
Subtotal Retirement Investments	_____
Loans Receivable	_____
Real Estate	
_____	_____
_____	_____
_____	_____
Subtotal Real Estate Assets	_____
Automobiles/Vehicles	
_____	_____
_____	_____
_____	_____
Subtotal Automobiles/Vehicles	_____
Other Assets	_____
Closely Held Business (Net Value)	_____
Cash Surrender Value - Life Insurance	_____
_____	_____
_____	_____
_____	_____
Subtotal Other Assets	_____
Total Assets	\$ _____

*The amount of assets is to be fair market value.

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Liabilities	Amount**
Student Loans	
Stafford	\$ _____
PLUS	_____
Unsubsidized	_____
Other	_____
_____	_____
Subtotal Student Loans	_____
Bank Loans	
_____	_____
_____	_____
_____	_____
Subtotal Bank Loans	_____
Family Loans	
_____	_____
_____	_____
_____	_____
Subtotal Family Loans	_____
Credit Card Balances	
_____	_____
_____	_____
_____	_____
_____	_____
Subtotal Credit Cards	_____
Taxes	
Federal	_____
State	_____
Subtotal Taxes	_____
Other Liabilities	
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
Subtotal Other Liabilities	_____
Total Liabilities	\$ _____
Net Worth	\$ _____

**The amount of liabilities is to be the total balance due including interest, fees, and other expenses.