



Assets and Liabilities Worksheet

Name:	
Date:	

Assets	Dollar Value	Description
Cash (Checking & On-Hand)		
Savings		
IRA, 401(k), or Other Retirement Accounts		
Life Insurance (Cash Surrender Value)		
Stocks, Bonds, CDs		
Real Estate		
Automobiles		
Accounts/Notes Receivable		
Other Assets		
Total Assets		

Liabilities	Dollar Value	Description
Credit Card		
Personal Loan		
Student Loan		
Vehicle Loan/Lease		
Mortgage		
Loan Against Life Insurance		
Loan Against Retirement Account		
Unpaid Taxes		
Other Liabilities		
Total Liabilities		

Income	Dollar Value	Description
Salary		
Net Investment Income		
Net Real Estate Income		
Other Income		
Total Income		

Credit Score:	
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Additional Notes:

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