

NAME

DATE

ASSETS	CURRENT BALANCE	OTHER INFO
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LIABILITIES	CURRENT BALANCE	INTEREST RATE	MINIMUM MONTHLY PYMT	YEARS REMAINING
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CASH & UNSECURED DEBT

Checking Account	Amount	[Pattern]	Credit Cards, list individually				[Pattern]
Savings Accounts	Amount		Credit Cards, list individually				
Certificates of Deposit	Amount	Maturity Date	Credit Cards, list individually				
Stocks & Bonds	Current Market Value	Purchase Price	Student Loan				
Other Liquid Investments (describe)	Amount	Purchase Price	Unpaid Taxes				
Other Liquid Investments (describe)	Amount	Purchase Price	Other Loans (describe)				

PERSONAL RESIDENCE & OTHER REAL ESTATE

Personal Residence	Current Market Value	Purchase Price	Mortgage, Personal Residence				
Other Real Estate (describe)	Current Market Value	Purchase Price	Mortgage, Other Real Estate				
Other Real Estate (describe)	Current Market Value	Purchase Price	Mortgage, Other Real Estate				
Other Real Estate (describe)	Current Market Value	Purchase Price	Mortgage, Other Real Estate				

AUTOS & OTHER PERSONAL PROPERTY (BOATS, RV'S, ETC.)

Automobile (describe)	Current Market Value	Purchase Price	Auto Loan / Lease				
Automobile (describe)	Current Market Value	Purchase Price	Auto Loan / Lease				
Automobile (describe)	Current Market Value	Purchase Price	Auto Loan / Lease				
Trailers, RVs, & Boats (describe)	Current Market Value	Purchase Price	Loan against Trailers, RVs, & Boats				
Personal Property	Current Market Value	[Pattern]	Loan against Personal Property				

SELF-EMPLOYMENT

Business Ventures	Current Market Value	Purchase Price	Loans against Business				
Business Ventures	Current Market Value	Purchase Price	Loans against Business				

RETIREMENT & LIFE INSURANCE

Life Insurance	Cash Surrender Value	Death Benefit	Loan on Life Insurance				
Life Insurance	Cash Surrender Value	Death Benefit	Loan on Life Insurance				
Life Insurance	Cash Surrender Value	Death Benefit	Loan on Life Insurance				
IRA	Current Amount	[Pattern]	Loan against IRA				
IRA	Current Amount		Loan against IRA				
Pension Plans & 401(k)'s	Vested Amount	[Pattern]	Loan against Pension Plans & 401(k)'s				
Pension Plans & 401(k)'s	Vested Amount		Loan against Pension Plans & 401(k)'s				

OTHER

Other Assets (describe)	Current Market Value	Purchase Price	Loan against Other Assets				
Other Assets (describe)	Current Market Value	Purchase Price	Other Loans (describe)				
Other Assets (describe)	Current Market Value	Purchase Price	Other Loans (describe)				

TOTALS ASSETS	
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TOTALS LIABILITIES	
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NET WORTH = (TOTAL ASSETS - TOTAL LIABILITIES)	
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