

LIST YOUR ASSETS

Name(s): _____

Date: _____

TYPES OF ASSETS

1 . Liquid Assets (easily converted to cash)

Cash on hand	\$
Checking account balance	\$
Money market funds	\$
CDs (% interest rate)	\$
Savings (% interest rate)	\$
Stocks & bonds	\$
Life insurance cash values	\$
Other (describe)	\$
TOTAL Liquid Assets:	\$

2. Non-liquid Assets

Home (market value)	\$
Land (market value)	\$
Net worth (value) of business	\$
Real estate investments (not home)	\$
Jet ski, camper, RV, boats, etc.	\$
Automobiles at market value	\$
Furniture & personal property (conservative market value)	\$
Valuable collections (stamps, coins, etc.)	\$
Retirement funds balance	\$
Funds due from others (receivables)	\$
Other (describe)	\$
Other (describe)	\$
TOTAL Non-liquid Assets	\$

3. Total Assets (1 + 2) \$