

FINANCIAL SNAPSHOT

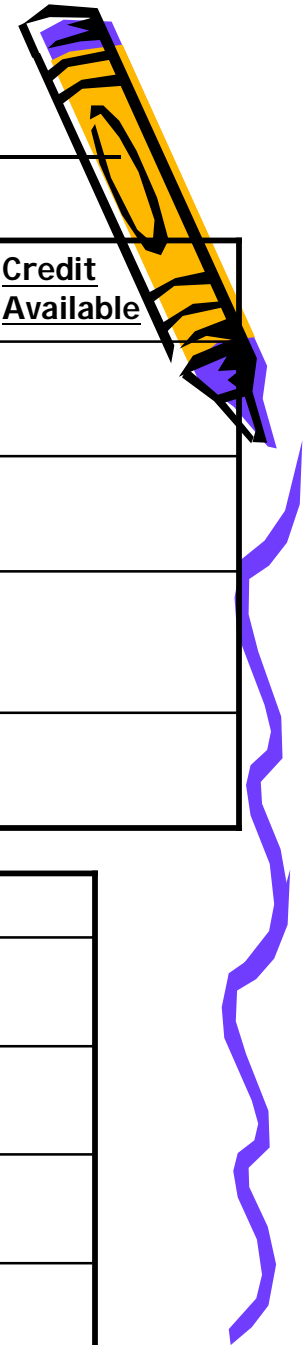
Use these worksheets to quickly calculate a current picture of your assets & spending. Once you realize what you own and what you spend, you can more accurately judge how much playing room you have. Reprint and update as often as you need.



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WHAT I OWN Assets as of Date: _____



Bank Accounts	<u>Account</u>	<u>Current Balance</u>
Checking		
Savings		
Investment		
Retirement		

Lines of Credit	<u>Account</u>	<u>Current Balance</u>	<u>Credit Available</u>
Mortgage			
Home Equity			
Car Loans/ leases			
Credit Cards			

Tangible Assets	<u>Item</u>	<u>Appraised Value</u>
Home (s)		
Antiques/Collectibles		
Art/Furnishings		
Jewelry/Clothing		



What I Spend-Monthly Expenses

as of _____

MANDATORY

Housing _____
Taxes (inc. RE tax) _____
Medical _____
Insurance _____
Basic Transportation _____
Basic Utilities _____
Basic Groceries _____
Basic Clothing _____
Basic Grooming _____

TOTAL MONTHLY _____ x 6

TOTAL 6 MONTH RESERVE*: _____

DISCRETIONARY

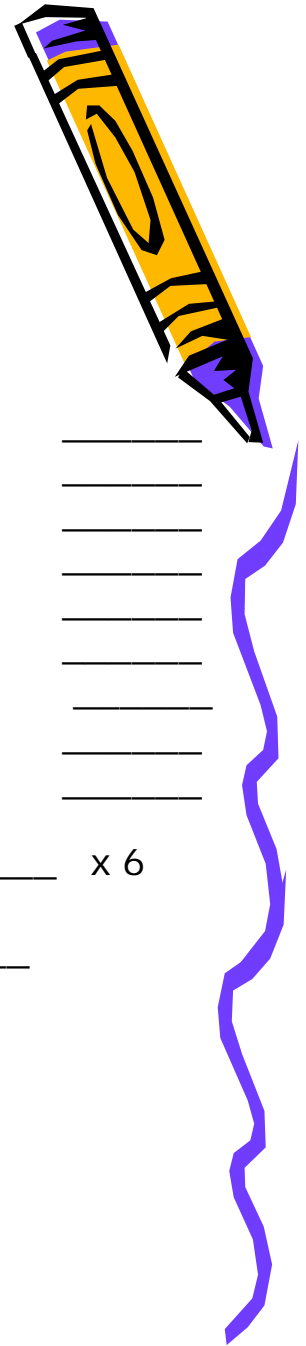
Education _____
Vacation _____
Entertainment (films, shows, hobbies) _____
Gifts _____
Luxury Transportation _____
Premium Utilities _____
Luxury Food (Gourmet items, restaurants) _____
Extensive Wardrobe Selections _____
Luxury Grooming _____

TOTAL MONTHLY _____ x 6

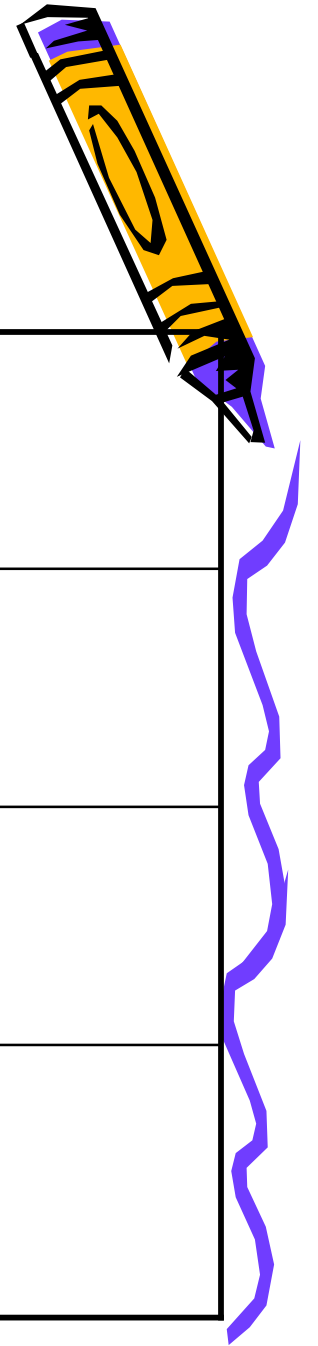
TOTAL 6 MONTH RESERVE*: _____

*6 month reserve recommended to have in liquid savings. Do I have this?

- ☐ Yes, 6 month reserve in _____ Account
☐ Not yet...so far _____ 6 month reserve being saved from _____



Marketable Skills



Skills	
Experience	
Industry Knowledge	
Contacts	

