

1-6. FAMILY BALANCE SHEET (Step 3)

ASSETS	LIABILITIES
Cash on Hand \$ _____	Automobile Loans
Checking Account Balances	Vehicle: _____ \$ _____
Account No. _____ \$ _____	Vehicle: _____ \$ _____
Account No. _____ \$ _____	Vehicle: _____ \$ _____
Savings Account Balances	Amount Owed On Mortgages
Account No. _____ \$ _____	Personal Residence—1st Mortgage \$ _____
Account No. _____ \$ _____	Personal Residence—2nd Mortgage \$ _____
Cash Value of Life Insurance Policies	Other: _____ \$ _____
Policy No. _____ \$ _____	Bank Loans
Policy No. _____ \$ _____	Loan For: _____ \$ _____
Cash Value of Bonds Owned	Loan For: _____ \$ _____
Type of Bonds: _____ \$ _____	Loan For: _____ \$ _____
Type of Bonds: _____ \$ _____	Finance Company Loans
Cash Value of Stock Owned	Loan For: _____ \$ _____
Type of Stock: _____ \$ _____	Loan For: _____ \$ _____
Type of Stock: _____ \$ _____	Charge Account Balances Owed
Cash Value of Mutual Funds Owned	Store: _____ \$ _____
Fund: _____ \$ _____	Store: _____ \$ _____
Fund: _____ \$ _____	Store: _____ \$ _____
Fund: _____ \$ _____	Credit Card Balances Owed
Cash Value of Other Liquid Assets	Company: _____ \$ _____
Explain: _____ \$ _____	Company: _____ \$ _____
Explain: _____ \$ _____	Company: _____ \$ _____
Fair Market Value of Real Estate	Insurance Loans
Personal Residence. \$ _____	Policy: _____ \$ _____
Other: _____ \$ _____	Policy: _____ \$ _____
Other: _____ \$ _____	Taxes Owed
Fair Market Value of Vehicles	Federal Income Tax \$ _____
Vehicle: _____ \$ _____	State Income Tax \$ _____
Vehicle: _____ \$ _____	Property Tax \$ _____
Vehicle: _____ \$ _____	Other: _____ \$ _____
Fair Market Value of Other Assets	Other Debts (Explain)
Furniture \$ _____	_____ \$ _____
Jewelry \$ _____	_____ \$ _____
Other: _____ \$ _____	
Other: _____ \$ _____	
Other: _____ \$ _____	
Other: _____ \$ _____	
Other: _____ \$ _____	
Other: _____ \$ _____	
Other: _____ \$ _____	
TOTAL ASSETS: \$ _____	TOTAL LIABILITIES: \$ _____
NET WORTH COMPUTATION	
Total Assets (From Column 1) \$ _____	
Less: Total Liabilities \$ _____	
NET WORTH: \$ _____	