

Assets & Liabilities Balance Sheet



	Owned by you personally	Owned by partner or spouse	Owned jointly or communally
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Assets

Annuities, Revocable Trusts	\$	\$	\$
Auto, RV, Boat, etc			
Bank Accounts, CDs, etc			
Business Interests			
Life Insurance (face value)			
Notes Owed (to you)			
Partnership Ventures			
Personal Property, Jewelry, etc			
Real Estate - Primary Residence			
Real Estate - Vacation, Rentals			
Retirement Funds			
Stocks, Bonds, Mutual Funds			
Other Assets			
Total Assets	\$	\$	\$

Liabilities

Bills (current)	\$	\$	\$
Loans			
Mortgages			
Taxes Owed			
Other Liabilities			
Total Liabilities	\$	\$	\$
NET ESTATE (Total Assets minus Total Liabilities)	\$	\$	\$