

## Wealth Worksheet

### Equity

Property (owned outright)	\$ _____
Property Mortgage Equity	\$ _____
Personal Business Value	\$ _____
Savings Balance	\$ _____
Checking Balance	\$ _____
Stocks/bonds	\$ _____
Vehicles (owned outright)	\$ _____
Vehicles Equity	\$ _____
Other (specify)	\$ _____
Other (specify)	\$ _____
Other (specify)	\$ _____
Total Equity	\$ _____

### Debt

Mortgage Balance	\$ _____
Auto Loan Balance	\$ _____
Credit Card Balance (list separately)	\$ _____
Credit Card Balance (list separately)	\$ _____
Credit Card Balance (list separately)	\$ _____
Credit Card Balance (list separately)	\$ _____
Credit Card Balance (list separately)	\$ _____
Other (specify)	\$ _____
Other (specify)	\$ _____
Other (specify)	\$ _____
Total Debt	\$ _____

Total Equity minus Total Debt = Net \$ \_\_\_\_\_

### Retirement Provisions

Military Retirement (est. monthly amount)	\$ _____
IRA (total value)	\$ _____
401K (total value)	\$ _____