



Homeword

PERSONAL FINANCIAL INVENTORY

SHORT TERM GOALS

LONG TERM GOALS

Name							
		DATE					
		Gross Income					
		Net Income					
		Middle Credit Score					
		Last Year Tax Refund					
Assets - What you OWN							
	Cash						
	Checking						
	Savings						
FMV = Fair Market Value (What you can sell the item for today)							
	Real Estate (FMV)						
	Vehicles (FMV)						
	Vehicles (FMV)						
	Cash Value Life Insurance						
	IRAs						
	401(k)						
	Things you can sell						
	Gifts						
		Total Assets					



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Liabilities - What you OWE									
%	Min. Monthly Payment	Who Debt is With	DATE						
		Late on bills							
		Credit Card							
		CC							
		CC							
		Collections							
		Auto Loan							
		Student Loans							
		IRS Debt							
		Mortgage(s)							
		Total Liabilities							