

# Family Balance Sheet

## CURRENT

(Could be turned into cash within 1 year)

CASH \_\_\_\_\_

CHECKING ACCOUNT \_\_\_\_\_

SAVINGS ACCOUNTS \_\_\_\_\_

CDs \_\_\_\_\_

BONDS \_\_\_\_\_

STOCKS \_\_\_\_\_

MUTUAL FUNDS \_\_\_\_\_

ANNUITIES-cash value \_\_\_\_\_

MONEY OWED YOU \_\_\_\_\_

LIFE INSURANCE \_\_\_\_\_

(present value) \_\_\_\_\_

OTHER \_\_\_\_\_

Total Current Assets \$ \_\_\_\_\_

## CURRENT LIABILITIES

(Due within one year)

CHARGE ACCOUNTS \_\_\_\_\_

INSTALLMENT LOANS \_\_\_\_\_

MORTGAGE LOANS \_\_\_\_\_

ACCOUNTS PAYABLE \_\_\_\_\_

OTHER \_\_\_\_\_

Total Current Liabilities \_\_\_\_\_

## NON-CURRENT ASSETS

(maturing in next 2-10 years)

STOCKS \_\_\_\_\_

BONDS \_\_\_\_\_

MUTUAL FUNDS \_\_\_\_\_

C.D.S. \_\_\_\_\_

HOUSEHOLD GOODS \_\_\_\_\_

CAR(S) \_\_\_\_\_

RETIREMENT/PENSION FUND \_\_\_\_\_

PERSONAL ITEMS \_\_\_\_\_

OTHER \_\_\_\_\_

Total Non-Current Assets \$ \_\_\_\_\_

## INTERMEDIATE LIABILITIES

(due next 2-10 years)

INSTALLMENT LOANS \_\_\_\_\_

MORTGAGE LOANS \_\_\_\_\_

OTHER \_\_\_\_\_

Total Intermediate Liabilities \_\_\_\_\_

## FIXED ASSETS

HOME (present market value) \_\_\_\_\_

OTHER REAL ESTATE \_\_\_\_\_

Total Non-Current Assets \$ \_\_\_\_\_

## LONG TERM LIABILITIES

MORTGAGE LOANS \_\_\_\_\_

OTHER \_\_\_\_\_

Total Long Term Liabilities \_\_\_\_\_

## TOTAL ASSETS

\$ \_\_\_\_\_

## TOTAL LIABILITIES

\$ \_\_\_\_\_

**PRESENT NET WORTH** \$ \_\_\_\_\_

**DATE** \_\_\_\_\_

\$ \_\_\_\_\_

\$ \_\_\_\_\_

**TOTAL ASSETS  
MINUS LIABILITIES  
EQUALS PRESENT NET WORTH**



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