

# Your Financial Inventory

		FINANCIAL INSTITUTION	AMOUNT	
OWN	<b>Short Term</b>			OWN TOTAL
	Checking	_____		
	Savings	_____		
	Money Market Accounts	_____		
	Other	_____		
	<b>Medium/Longer Term</b>			
	Investment Accounts	_____		
	Retirement Accounts	_____		
	Insurance and Annuities	_____		
	Real Estate	_____		
OWE	Credit Cards	_____		OWE TOTAL
	Student Loan	_____		
	Car Loan	_____		
	Mortgage	_____		
	Other	_____		
	<b>OWN TOTAL</b>			
		<b>OWE TOTAL</b>		
			<b>NET FINANCIAL ASSETS</b>	

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