## ASSETS AND LIABILITIES:
Include information for everyone in the household.
*Back up documentation may be requested.*

| ASSETS: | | Name of Entity | Value ($) |
|---|---|---|---|
| 1. | Bank or Credit Union 1 | _____ | _____ |
| 2. | Bank or Credit Union 2 | _____ | _____ |
| 3. | Other Banks or Credit Unions | _____ | _____ |
| 4. | Stocks & Bonds | _____ | _____ |
| 5. | Real Estate (value from County Assessor) | _____ | _____ |
| 6. | Retirement accounts | _____ | _____ |
| 7. | Car (list Make, Model & Year) | _____ | _____ |
| 8. | Car (list Make, Model & Year) | _____ | _____ |
| 9. | Toys (Bicycles, Campers, Boats, etc.) | _____ | _____ |
| 10. | Other: _____ | _____ | _____ |
| **TOTAL ASSETS:** | | | _____ |

| LIABILITIES: | | | |
|---|---|---|---|
| 1. | Mortgage Loans (include all. 1st, 2nd, etc) | _____ | _____ |
| 2. | Car Loans | _____ | _____ |
| 3. | Student Loan | _____ | _____ |
| 4. | Credit Cards | _____ | _____ |
| 5. | Additional Loans | _____ | _____ |
| 6. | Other: _____ | _____ | _____ |
| **TOTAL LIABILITIES:** | | | _____ |

**TOTAL NET WORTH (Assets minus Liabilities):**             _____