



My Financial Snapshot

EXERCISE. Please use the worksheet below to record information about YOUR current financial situation as you understand it. If you are not sure, leave it blank and circle it to revisit later. This information will help you and your coach get a clearer picture of your current financial situation.

Cash Reserve			Real Estate			
Description	Details	Balance	Description	Value	Owed	Interest %
Checking 1		\$	Residence	\$	\$	
Checking 2		\$	Rental Property	\$	\$	
Savings 1		\$	Other	\$	\$	
Savings 2		\$	HELOC	\$	\$	
Other		\$				
Other		\$				

Investments			Credit Cards			
Description	Type	Balance	Description	Limit	Balance	Interest %
Investment 1		\$	Credit Card 1	\$	\$	
Investment 2		\$	Credit Card 2	\$	\$	
Investment 3		\$	Credit Card 3	\$	\$	
Investment 4		\$	Credit Card 4	\$	\$	
Annuity 1		\$	Credit Card 5	\$	\$	
Annuity 2		\$	Credit Card 6	\$	\$	
Other		\$	Other	\$	\$	



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Retirement Accounts			Autos, Boats, Motorcycles		
Description	Yours	His	Description	Value	Details
401(k) / 403(b)	\$	\$	Vehicle 1	\$	
Pension	\$	\$	Vehicle 2	\$	
IRA 1	\$	\$	Other	\$	
IRA 2	\$	\$	Other	\$	
Roth IRA 1	\$	\$			
Roth IRA 2	\$	\$			
Other	\$	\$			
Other	\$	\$			

Estate Planning		Insurance			
Description	Details	Description	Face Amt.	Premium	Beneficiary
Trust		Life 1	\$	\$	
Will		Life 2	\$	\$	
Durable POA		Group Term 1	\$	\$	
Healthcare POA		Disability 1	\$	\$	
Healthcare Directive		Group Disability 1	\$	\$	
Guardianship		Long-Term Care 1	\$	\$	
Other		Other	\$	\$	

Home/Auto/Umbrella		
Description	Carrier	Details
Home/Auto/Umbrella	\$	
Other	\$	
Other	\$	

