



Advanced Balance Sheet Exercise

	Current	Future
Assets (for Self or Dual Income Household)		
Real Estate		
Tangible Personal Property- Car, Art, Jewelry, etc.		
Checking Account		
Savings Account		
Investment/Brokerage Account		
Revocable Trust		
IRA		
Employer- 401K, 403b		
Employer- Company Stock Options		
Other Business Ownership		
Other		
Assets (for Children)		
529 Plan		
Custodial Account		
2503(c)- Minor's Trust		
Other Account		
Total Assets (Self)		
Total Assets (Household)		
Total Assets		

	Current	Future
Liabilities		
Mortgage		
Home Equity Line of Credit (HELOC)		
Other Line of Credit or Personal Loan		
Credit Card Debit		
Philanthropy- Commitment to Donate or Other Pledge		
Gifting to Individuals		
Educational Loans		
Insurance- Car, Auto, Life, Health, etc.		
Real Estate Expenses- Property Taxes, HOA Dues, Insurance, Rent, Co-Op Fees, Utilities, Repairs, Etc.		
Current Expenses- Monthly Bills, Car Payments, Subscriptions, Membership Dues		
Income Tax Payments (Federal & State)		
Childcare Expenses		
Other		
Total Liabilities		

Net Worth		
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