

Retirement Planning

Assets Worksheet

Cash on hand	_____
Checking account balance	_____
Savings account balance	_____
Money Market totals	_____
Real estate value	_____
Life insurance cash value	_____
Stocks value	_____
Mutual funds value	_____
Bonds value	_____
IRAs value	_____
401k or retirement plan value	_____
Loans receivable	_____
Automobile(s) value	_____
Jewelry value	_____
Antiques and collectibles	_____
Household goods	_____
Other assets	_____
Total Assets	_____