Balance Sheet

Presented by: Your Financial Advisor

Prepared for:

	1	Assets		
		Market Value (Husband/ Partner)	Market Value (Wife/ Partner)	Market Value (Joint)
Checking Accounts Savings Accounts		\$	\$	\$
CDs				
J.S. Savings Bonds				
1utual Funds				
tocks/Bonds imited Partnerships				
lesidence(s)				
nvestment Real Estat	e			
ife Insurance Cash Va	alues			
Annuities				
RAs Qualified Retirement P	Plans (vested)			
Business Interests	ialis (vesteu)			
Collectibles				
Automobiles				
Personal Property				
Other: OTAL		\$ <u>0</u>	\$	\$ <u> </u>
	TOTAL ASSETS	T	\$0	T
	Li	abilities		
		Monthly Payı	ment I	Balance
		Monthly Payı \$		Balance ————
ther Real Estate Loar	ns			
Other Real Estate Loar Home Equity Loans	ns			
Mortgage(s) Other Real Estate Loar Home Equity Loans Auto Loans Education Loans	ns			
Other Real Estate Loar Home Equity Loans Auto Loans Education Loans nstallment Loans	ns			
Other Real Estate Loan Ilome Equity Loans Luto Loans Iducation Loans Installment Loans Charge Accounts	ns			
Other Real Estate Loar Home Equity Loans Auto Loans Education Loans Installment Loans Charge Accounts Credit Cards	ns			
other Real Estate Load ome Equity Loans uto Loans ducation Loans installment Loans tharge Accounts redit Cards ersonal Credit Line	ns			
other Real Estate Load lome Equity Loans luto Loans ducation Loans installment Loans tharge Accounts fredit Cards ersonal Credit Line lusiness Debt	ns			
Other Real Estate Load Home Equity Loans Nuto Loans Education Loans Installment Loans Charge Accounts Credit Cards Personal Credit Line Business Debt Other:		\$	\$\$	
ther Real Estate Loar ome Equity Loans uto Loans ducation Loans estallment Loans harge Accounts redit Cards ersonal Credit Line usiness Debt ther:	TOTAL LIABILITIES	\$	\$\$	
Other Real Estate Load Iome Equity Loans Luto Loans Iducation Loans Installment Loans Charge Accounts Credit Cards Iersonal Credit Line Issusiness Debt Other:	TOTAL LIABILITIES Bala	\$\$\$s	\$	
Other Real Estate Load Home Equity Loans Auto Loans Education Loans Installment Loans Charge Accounts Credit Cards Personal Credit Line Business Debt Other:	TOTAL LIABILITIES Bala Total Assets	\$\$ s\$	\$	
Other Real Estate Load Home Equity Loans Auto Loans Education Loans Installment Loans Charge Accounts Credit Cards Personal Credit Line Business Debt Other:	TOTAL LIABILITIES Bala Total Assets S Total Liabilities -	\$\$\$s	\$	

VSA CW-02 ed. 09-12 Page 1 of 1

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