

# A BALANCE SHEET

TAKING STOCK & KEEPING TRACK

## Womansplaining

*A Financial Wellness Blog. By Women...For Women.*

Brought to you by:



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NAME

DATE

# ESTATE NET WORTH (ENW)

Assets - Liabilities + LI = ENW

## ASSETS (what you own!)

### CASH & CASH EQUIVALENTS

Amount

Checking Accounts

Savings Accounts

Certificates of Deposit

Money market funds

Cash

Other (specify)

Other (specify)


### TOTAL CASH AND BANK ACCOUNTS

### RETIREMENT & NON-RETIREMENT INVESTMENTS

Amount

Non Retirement Investment Accounts (e.g. stocks, bonds, mutual funds)

Retirement Investment Accounts (e.g. 401(k), 403(b), 457 Plans, etc)

Traditional IRAs

Roth IRAs

Other (specify)

Other (specify)


### TOTAL INVESTMENTS

### REAL USE ASSETS

Amount

Home

Recreational Vehicle/Boat

Automobile

Personal Property

Collections (e.g. fur, jewelry, antiques, art, stamps)

Other (specify)

Other (specify)


### TOTAL REAL USE ASSETS

## TOTAL ASSETS

## LIABILITIES (what you owe!)

### Short & Long Term

Amount

Credit Cards

Home Loans

Auto Loans

Student Loans

Personal Loans

Other (specify)


### TOTAL LIABILITIES

## LIFE INSURANCE

Life Insurance

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