**THE MONEYSENSE COMPLETE FINANCIAL PLAN KIT**

**WORKSHEET #9: YOUR FINANCIAL PLAN**

FOR: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

DATE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CURRENT SITUATION

*(Fill in your current situation here)*

TOP FIVE FINANCIAL GOALS

*(Fill in your current situation here)*

NET WORTH STATEMENT

**ASSETS**

Liquid Assets $\_\_\_\_\_\_\_\_\_

Registered investment accounts $\_\_\_\_\_\_\_\_\_

Primary residence $\_\_\_\_\_\_\_\_\_

Other $\_\_\_\_\_\_\_\_\_

Other $\_\_\_\_\_\_\_\_\_

**TOTAL ASSETS** (A) $\_\_\_\_\_\_\_\_\_

**LIABILITIES**

Credit card balances $\_\_\_\_\_\_\_\_\_

Equity line of credit $\_\_\_\_\_\_\_\_\_

Mortgage on residence $\_\_\_\_\_\_\_\_\_

Other $\_\_\_\_\_\_\_\_\_

**TOTAL LIABILITIES** (L) $\_\_\_\_\_\_\_\_\_

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WORKSHEET #9: YOUR FINANCIAL PLAN

NET WORTH (ASSETS - LIABILITIES) $\_\_\_\_\_\_\_\_\_

INCOME AND EXPENSES

INSURANCE

RETIREMENT PLANNING

INVESTMENT PLANNING

*(See the Investment Policy Statement)*

ESTATE PLANNING