



TOPIC 4 | MY FINANCIAL SNAPSHOT

ACTIVITY. Please use the worksheet below to record information about your current financial situation. This information is important as you and your coach will refer back to this worksheet often.

MY FINANCIAL SNAPSHOT WORKSHEET

Cash Reserve			Real Estate			
Description	Details	Balance	Description	Value	Owed	Interest %
Checking 1		\$	Residence	\$	\$	
Checking 2		\$	Rental Property	\$	\$	
Savings 1		\$	Other	\$	\$	
Savings 2		\$	HELOC	\$	\$	
Other		\$				
Other		\$				

Investments			Credit Cards			
Description	Type	Balance	Description	Limit	Balance	Interest %
Investment 1		\$	Credit Card 1	\$	\$	
Investment 2		\$	Credit Card 2	\$	\$	
Investment 3		\$	Credit Card 3	\$	\$	
Investment 4		\$	Credit Card 4	\$	\$	
Annuity 1		\$	Credit Card 5	\$	\$	
Annuity 2		\$	Credit Card 6	\$	\$	
Other		\$				

Retirement Accounts			Autos, Boats, Motorcycles		
Description	Yours	His	Description	Value	Details
Description	\$	\$	Vehicle 1	\$	
401(k) / 403(b)	\$	\$	Vehicle 2	\$	
Pension	\$	\$	Other	\$	
IRA 1	\$	\$	Other	\$	
IRA 2	\$	\$			
Roth IRA 1	\$	\$			
Roth IRA 2	\$	\$			
Other	\$	\$			
Other	\$	\$			

Estate Planning		Insurance			
Description	Details	Description	Face Amt.	Premium	Beneficiary
Description		Life 1	\$	\$	
Trust		Life 2	\$	\$	
Will		Group Term 1	\$	\$	
Durable POA		Disability 1	\$	\$	
Healthcare POA		Group Disability 1	\$	\$	
Healthcare Directive		Long-Term Care 1	\$	\$	
Other (Guardianship)		Other	\$	\$	

Home/Auto/Umbrella		
Description	Carrier	Details
Home/Auto/Umbrella	\$	
Other	\$	
Other	\$	