

Personal Inventory Worksheet

Property	Company	Client	Spouse	Joint	Annual Income
Savings Account					
Checking Account					
Money Market					
CDs					
Brokerage Account 1					
Brokerage Account 2					
IRA 1					
IRA 2					
Employer Retirement Plan 1					
Employer Retirement Plan 2					
Trust					
Primary Home					
Second Home/ Vacation Home					
Rental Property					
Land					
Business Interests					
Additional Assets:					

Liability	Lender	Balance	Monthly Payment	Additional Monthly Payments	Interest Rate	Payoff Date
Primary Home*						
Second Home						
Rental Property						
Home Equity Loan						
Auto Loan						
Credit Card 1						
Credit Card 2						
Credit Card 3						
Student Loans						
Additional Liabilities:						

* Include only the portion of the payment that is Principal and Interest