

Sample Personal Balance Sheet

	January 1, Last Year	January 1, This Year	Annual % Increase	Current Total	YTD% Increase
ASSETS					
Retirement Accounts	\$	\$	%	\$	%
Equity Investments					
Businesses Private	\$	\$	%	\$	%
Businesses Public	\$	\$	%	\$	%
Stocks	\$	\$	%	\$	%
Bonds	\$	\$	%	\$	%
Annuities	\$	\$	%	\$	%
Total Equity Investments	\$	\$	%	\$	%
Cash/Savings	\$	\$	%	\$	%
Insurance	\$	\$	%	\$	%
Collectibles	\$	\$	%	\$	%
Personal Property	\$	\$	%	\$	%
Real Estate Personal	\$	\$	%	\$	%
Real Estate Investments	\$	\$	%	\$	%
Notes Receivable	\$	\$	%	\$	%
Other Assets	\$	\$	%	\$	%
TOTAL ASSETS	\$	\$	%	\$	%
LIABILITIES					
Car Loans	\$	\$	%	\$	%
Credit Card Debt	\$	\$	%	\$	%
Mortgage Debt	\$	\$	%	\$	%
School Loans	\$	\$	%	\$	%
Other Debt	\$	\$	%	\$	%
TOTAL LIABILITIES	\$	\$	%	\$	%
NET WORTH	\$	\$	%	\$	%
ANNUAL CASH FLOW (EARNED)	\$	\$	%	\$	%
ANNUAL CASH FLOW (UNEARNED)	\$	\$	%	\$	%