

# FINANCIAL ANALYZER

## Taking a Look at Your Financial Picture

By using this worksheet, you can get a snapshot of what assets you have and where your money goes. Then, determine where you can make changes to free up additional money for your financial priorities.

NET WORTH ASSESSOR		CASH FLOW ANALYZER	
<b>Assets</b>		<b>Monthly Income</b>	
Home	\$ _____	Monthly Wages, Salary	\$ _____
Vacation Home	\$ _____	Dividends	\$ _____
Furnishings	\$ _____	Interest	\$ _____
Valuables	\$ _____	Other	\$ _____
Automobiles	\$ _____	<b>Total Monthly Income</b>	<b>\$ _____</b>
Stocks	\$ _____	<b>Monthly Expenses</b>	
Bonds	\$ _____	Mortgage/Rent	\$ _____
Mutual Funds	\$ _____	Transportation	\$ _____
Annuities	\$ _____	Food	\$ _____
Business Equity	\$ _____	Education/Child Care	\$ _____
Checking Accounts	\$ _____	Entertainment	\$ _____
Savings Accounts	\$ _____	Medical	\$ _____
CDs	\$ _____	Loan Payments	\$ _____
Credit Union	\$ _____	Utilities	\$ _____
Cash Value of Life Insurance	\$ _____	Clothes	\$ _____
Other	\$ _____	Other	\$ _____
<b>Total Assets</b>	<b>\$ _____</b>	<b>Total Monthly Expenses</b>	<b>\$ _____</b>
<b>Liabilities</b>		<b>Discretionary Income</b>	
Home Mortgage	\$ _____	Monthly Income	\$ _____
Home Equity Loans	\$ _____	<i>minus</i> Monthly Expenses	-\$ _____
Auto Loans	\$ _____	<i>minus</i> Monthly Savings and Investments	-\$ _____
Bank Loans	\$ _____	<b>Total Discretionary Income</b>	<b>\$ _____</b>
Credit Cards	\$ _____		
<b>Total Liabilities</b>	<b>\$ _____</b>		
Total Assets	\$ _____		
<i>minus</i> Total Liabilities	-\$ _____		
<b>Total Net Worth</b>	<b>\$ _____</b>		

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