

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	
Assets		Monthly Income	
Home	\$ _____	Monthly Wages, Salary	\$ _____
Vacation Home	\$ _____	Dividends	\$ _____
Furnishings	\$ _____	Interest	\$ _____
Valuables	\$ _____	Other	\$ _____
Automobiles	\$ _____	Total Monthly Income	\$ _____
Stocks	\$ _____	Monthly Expenses	
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	\$ _____
Total Assets	\$ _____	Total Monthly Expenses	\$ _____
Liabilities		Discretionary Income	
Home Mortgage	\$ _____	Monthly Income	\$ _____
Home Equity Loans	\$ _____	<i>minus</i> Monthly Expenses	-\$ _____
Auto Loans	\$ _____	<i>minus</i> Monthly Savings and Investments	-\$ _____
Bank Loans	\$ _____	Total Discretionary Income	\$ _____
Credit Cards	\$ _____		
Total Liabilities	\$ _____		
Total Assets	\$ _____		
<i>minus</i> Total Liabilities	-\$ _____		
Total Net Worth	\$ _____		

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