FINANCIAL INVENTORY

MORTGAGE

Starting Date :

Length : 15 years 20 years 30 years

Amount :

Interest Rate :

LOANS

Type(s) :

Length :

Amount(s) :

CREDIT CARDS

Number :

Amount(s) :

INCOME (W-2 & 1099)

Married :

Single :

Dependants:

INVESTMENTS (Equities - Bonds -CDs - TBills - Money Market )

Type(s) & Amount(s)

RETIREMENT PLANS (IRA - Roth IRA - 401k - 403b - 457 - 412e)

Type(s) & Amount(s)

LIFE INSURANCE

Type(s) ( Term, Whole Life, Universal)

Amount(s) :

LONG TERM CARE

Monthly Amount Paid by Policy

Length (3 Years- 4 Years - Lifetime)