

## FINANCIAL CHECK-UP

	<b>ASSET</b>	<u>Monthly Contribution</u>	<b>BALANCE</b>	<u>Rate of Return</u>		<b>LIABILITIES</b>	<u>Monthly Payment</u>	<b>BALANCE</b>
Savings at:		\$	\$		Credit Cards:		\$	\$
		\$	\$				\$	\$
IRA Accounts:		\$	\$		Ins. Pol. Loans		\$	\$
		\$	\$				\$	\$
TSA/TDA:		\$	\$		Auto Loans:		\$	\$
401k:		\$	\$				\$	\$
Business:		\$	\$		Business Loans:		\$	\$
		\$	\$				\$	\$
Mutual Funds:		\$	\$		Personal Loans:		\$	\$
		\$	\$				\$	\$
Stocks/Bonds:		\$	\$		Education Loans:		\$	\$
		\$	\$				\$	\$
Trust Fund:		\$	\$		Mortgage:	Rate %	\$	\$
Ins Cash Value		\$	\$				Rate %	\$
Auto:			\$		Home Equity:	Rate %	\$	\$
Other:			\$				Rate %	\$
Real Estate:	Home FMV		\$		<b>TOTAL LIABILITIES:</b>		\$	\$
	Investment FMV		\$					
	Investment FMV		\$					
<b>TOTAL ASSETS</b>		\$	\$		<b>NET WORTH</b>		\$	\$

### L I F E I N S U R A N C E

<u>Insured/Owner</u>	<u>Policy Type/Effective Date</u>	<u>Company/Carrier</u>	<u>Beneficiary</u>	<u>Face Amount</u>	<u>Premium/Mode</u>	<u>Cash Value/Loan</u>

### D I S A B I L I T Y I N S U A N C E

<u>Company Name/Type</u>	<u>\$ Monthly Income</u>	<u>Benefit Time Period</u>	<u>Elimination Period</u>	<u>Premium</u>

### L O N G T E R M C A R E I N S U R A N C E

<u>Company Name/Type</u>	<u>\$ Monthly Income</u>	<u>Benefit Time Period</u>	<u>Elimination Period</u>	<u>Premium</u>	<u>HHC</u>	

**H O M E O W N E R   I N S U R A N C E**

<u>Company/Carrier</u>	<u>Policy Type/Effective Date</u>	<u>Deductible</u>	<u>Premium/Mode</u>			

**A U T O   I N S U R A N C E**

<u>Company/Carrier</u>	<u>Vehicle</u>	<u>Policy Type/Effective Date</u>	<u>Deductible</u>	<u>Premium/Mode</u>

**U M B R E L L A / E X C E S S   I N S U R A N C E**

<u>Company Name/Type</u>	<u>Policy Type/Effective Date</u>	<u>Premium/Mode</u>				