FINANCIAL CLARITY
taking inventory

from words+money podcast episode one on setting the intention: action is the answer

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CASH

SAVINGS ACCOUNTS:
CHECKING ACCOUNTS:
OTHER CASH:
(CDs, life insurance, cash under the mattress)

INVESTMENTS

INVESTMENT ACCOUNTS:
(stocks, bonds, funds t-bills)
RETIREMENT ACCOUNTS:
(401k, IRA, Roth, pension)
OTHER:

PHYSICAL ASSETS

OWNED HOME:
OWNED CAR:
JEWELRY/COLLECTIBLES:
OTHER:

TOTAL ASSETS:

fill in total balance for each category

use current/present market value

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liabilities

DEBT

STUDENT LOANS:
CAR LOANS:
MORTGAGE:
CREDIT CARD DEBT:

OTHER:
(unpaid taxes, money owed to others, misc. loans)

TOTAL LIABILITIES:

net worth

TOTAL ASSETS - TOTAL LIABILITIES = NET WORTH

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