

MONEY SNAPSHOT

{everything you needed to know about your finances in one place}



WHAT YOU HAVE (VALUE GIVEN)

CASH

YOU:
YOUR PARTNER:
SPARE CHANGE:

IRA

YOU:
YOUR PARTNER:

CHECKING

ACCT. #1:
ACCT. #2:

OTHER INVESTMENTS

ACCT. #1:
ACCT. #2:
ACCT. #3:
ACCT. #4:
ACCT. #5:

SAVINGS

ACCT. #1:
ACCT. #2:
ACCT. #3:
ACCT. #4:
EMERGENCY FUND:

VEHICLE VALUE

CAR #1:
CAR #2:
OTHER:
OTHER:

PAYPAL

YOU:
YOUR PARTNER:

REAL ESTATE VALUE

HOME #1:
HOME #2:
HOME #3:

401(K)

YOU:
YOUR PARTNER:

EVERYTHING ELSE

ACCT. #1:
ACCT. #2:

“RIGHT NOW, TODAY, YOU ARE PERFECTLY ALRIGHT.”

—JERROLD MUNDIS

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WHAT YOU OWE (VALUE RECEIVED)

CREDIT CARDS

CARD #1:

CARD #2:

CARD #3:

CARD #4:

VEHICLE LOANS

LOAN #1:

LOAN #2:

LOAN #3:

PERSONAL LOANS

LOAN #1:

LOAN #2:

LOAN #3:

MORTGAGES

MORTGAGE #1:

MORTGAGE #2:

OTHER MONIES OWED

OTHER #1:

OTHER #2:

OTHER #3:



THE SNAPSHOT

TOTAL VALUE GIVEN

TOTAL VALUE RECEIVED

DIFFERENCE

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—JERROLD MUNDIS

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