



Values as of

## LIQUID ASSETS

Description

Total

**Taxable Assets** (Checking & Savings Accounts, Brokerage Accounts, Liquid Investments)


**Total Taxable Assets**

**Tax Deferred Assets** (IRA, 401k, Deferred Compensation)


**Total Tax Deferred Assets**

**Total Liquid Assets**

**Other Assets** (Real Estate, Illiquid Investments, Businesses, Artwork)


**Subtotal Other Assets**

**Total Assets**

**Liabilities** (Mortgage, Car Loan, Credit Card, Student Debt)


**Total Liabilities**

**Net Worth (Assets - Liabilities)**