

SAMPLE Balance Sheet

As of: _____

Assets	Jon	Katie	Joint	Total
Joint Checking			\$2,302	\$2,302
Savings	\$5,000			\$5,000
Savings		\$7,500		\$7,500
Joint ETrade	\$22,412			\$22,412
403b	\$125,000			\$125,000
401k		\$77,000		\$77,000
Rollover IRA		\$44,000		\$44,000
Residence			\$189,000	\$189,000
Cash Value Life Insurance	\$6,700			\$6,700
Cash Value Life Insurance		\$11,200		\$11,200
Personal Property			\$35,000	\$35,000
Total Assets:	\$159,112	\$139,700	\$226,302	\$525,114

Liabilities	Jon	Katie	Joint	Total
Mortgage			\$112,000	\$112,000
Credit Card	\$4,400			\$4,400
Student Loan		\$3,500		\$3,500
Car Loan	\$11,000			\$11,000
Total Liabilities:	\$15,400	\$3,500	\$112,000	\$130,900