

Personal Balance Sheet

Assets		Liabilities	
Cash & Cash Equivalents		Current Liabilities	
Cash (Chequing Account and Cash on hand)		Credit Cards	
Savings Account		Lines of Credit	
Savings Bonds		Amounts Owing	
Term Savings		Total	
Other Assets (money market funds, etc.)		Medium-term Liabilities	
Total		Auto Loans	
Non-Registered Investments		Personal Loans	
Term Savings		Other	
Indexed Term Savings		Total	
Bonds (corporate, debentures, etc.)		Long-term Liabilities	
Investment Funds		Mortgage (primary)	
Stock		Mortgage (secondary)	
Other		Mortgage (rental)	
Total		Loans for Investment	
Registered Plans		Student Loans	
Registered Retirement Savings Plan (RRSP)		Other	
Locked-In Retirement Account (LIRA)		Total	
Registered Retirement Income Fund (RRIF)		Total Liabilities	
Life Income Fund (LIF)			
Registered Education Savings Plan (RESP)		Net Worth	
Annuity (Life or Fixed-term)		Total Assets	
Registered Pension Plan		Total Liabilities	
Tax-Free Savings Account (TFSA)		Net Worth	
Other			
Total			
Personal Assets			
Primary Residence			
Secondary Residence			
Rental Property			
Vehicle 1			
Vehicle 2			
Recreational Vehicle			
Furniture			
Jewelry			
Collections			
Art			
Life Insurance Cash Surrender Value			
Other			
Total			
Total Assets			