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Income & Net Worth Calculation

Client A Name:		
Monthly Earnings	Monthly Earnings	
Self Employment	Self Employment	
Alimony	Alimony	
Social Security	Social Security	
Other	Other	
Monthly Expenses for Household (from I	Expenses Worksheet)	
ASSETS - CLIENT A	ASSETS - CLIENT B	
Cash (checking &	Cash (checking & savings)	
savings) ————————————————————————————————————	Money Market	
CD's or T-Bills	CD'e or T-Rille	
Stocks	Charles	
Stocks	Stocks	
Mutual Funds	Mutual Funds	
Mutual Funds	Mutual Funds	
Bonds	Bonds	
Cash Value of Life Ins.	Cash Value of Life Ins.	
IRA or Keogh	IRA or Keogh	
IRA Traditional	IRA Traditional	
IRA Roth	IRA Roth	
401(k)	401(k)	
TSA/TDA	TSA/TDA	
SEP/SIMPLE	SEP/SIMPLE	
Pension Plan	Pension Plan	
Residence	Residence	
Other Real Estate	Other Real Estate	
Business	Business	
Vehicles	Vehicles	
Furnishings	Furnishings	
TOTAL ASSETS	TOTAL ASSETS	
LIABILITIES - CLIENT A	LIABILITIES - CLIENT B	
Auto Loans	Auto Loans	
Bank Loans	Bank Loans	
Home Mortgage	Home Mortgage	
Other Mortgage		
Other Debt		
Credit Card Debt		
TOTAL LIABILITIES	TOTAL LIABILITIES	
Net Worth (subtract total liabilities fro	m total assets)	