

MaraAccountant.com
Financial Assessment Form

The first step to our *Budget => Save => Build* program is to assess your current financial situation. Please fill in the information below as of today or your latest statement balance.

ASSETS

Bank Accounts

	<u>Bank Name</u>	<u>Account Type</u>	<u>Account Balance</u>
1			
2			
3			
4			
5			
6			
7			
8			
9			
	Total in Bank Accounts:		

Investments

	<u>Financial Institution Name</u>	<u>Account Type</u>	<u>Account Balance</u>
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
	Total Investments:		

Other Assets

	<u>Purpose/Description</u>	<u>Asset Type</u>	<u>Value of Asset</u>
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
	Total Other Assets:		

TOTAL ASSETS

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LIABILITIES *(type in as negative numbers)*

Credit Cards

	Financial Institution Name	Account Type	Account Balance
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
		Total Credit Cards:	

Other Unsecured Loans *(personal loans, student loans, etc.)*

	Financial Institution Name	Account Type	Account Balance
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
		Total Unsecured Loans:	

Secured Loans *(mortgages, car notes, etc.)*

	Financial Institution Name	Account Type	Account Balance
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
		Total Secured Loans:	

TOTAL LIABILITIES

TOTAL ASSETS MINUS LIABILITIES