

# Financial Planning

Use this sheet to help keep track and organize your loved ones finances.

Assets	Account #	Balance
Savings Account		
Checking Account		
Investment Account		
Other securities		
Retirement Accounts		
	Description	Value
	Real Estate	
	Cars, Boats, Other vehicles	
	Valuables (Jewelry, Painting, etc.)	
	Business and Partnership Agreements	
	Profit-sharing and pension plans	
	Annuities	
	Life Insurance	
	Other	

Debts	Description	Amount
	Mortgage	
	Car Loan	
	Other outstanding loans	
	Credit card debt	
	Other	

Estimated Future Expenses	Cost
Home renovations	
Assisted living devices	
Medical Bills	
Home health care	
Assisted living	
Legal/financial fees	
Funeral expenses	