

Personal Balance Sheet

Assets

Investment Assets - Currently Taxable

Fixed principal _____
U.S. and intermediate grade corporate bonds _____
High yield bonds _____
U.S. stocks (growth, growth & income) _____
U.S. stocks (aggressive growth, small co.) _____
International bonds _____
International stocks _____
Other: _____

Sub-total

Investment Assets - Tax-Deferred Retirement Accounts

Fixed principal _____
U.S. and intermediate grade corporate bonds _____
High yield bonds _____
U.S. stocks (growth, growth & income) _____
U.S. stocks (aggressive growth, small co.) _____
International bonds (government) _____
International stocks _____
Other: _____

Sub-total

Personal Assets

Residence _____
Business _____
Business _____
Personal property _____
Vehicles _____
Cash _____
Other: _____

Sub-total

Total Assets

Liabilities

Mortgage _____
Personal property _____
Vehicles _____
Credit card _____
Investment loans _____
Other loans or debts: _____
Other loans or debts: _____

Total Liabilities

Net Worth (Subtract Total Liabilities from Total Assets)

Metropolitan Life Insurance Company, MLIC, New York, NY 10166.
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