

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.
Securities products offered by MetLife Securities, Inc. MSI, member FINRA/SIPC. New York, NY 10166. MLIC and MSI are MetLife companies.