



Startup Daddy™

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Personal Financial Checkup

As of: ___/___/___

Assets

Cash - Checking Accounts \$ _____

Cash - Savings Accounts \$ _____

Certificates of Deposit \$ _____

Stocks / Bonds / Mutual Funds* \$ _____

Life Insurance (cash surrender value) \$ _____

Personal Property (autos, jewelry, etc.) \$ _____

Retirement Funds (IRAs, 401k, etc.) \$ _____

Real Estate (market value) \$ _____

Other Assets \$ _____

Total Assets \$ _____

Liabilities

Unsecured Debt (credit cards, lines of credit) \$ _____

Secured Debt (Real Estate Mortgages) \$ _____

Taxes payable \$ _____

Other liabilities \$ _____

Total Liabilities \$ _____

Net Worth \$ _____