

Financial Property Assets Worksheet

This worksheet is for information on all your bank accounts, brokerage accounts, and other investments.

Financial Property	Date Purchased	How much did you pay?	Today's Date	What's It Worth Today?
Bonds (type)				
Bond mutual funds (type)				
Certificates of Deposit				
Checking Accounts				
Coin Collection				
Money Market Accounts				
Pensions and Profit Sharing Plans				
Savings Accounts				
Savings Bonds				
Stocks				
Stock Mutual Funds				
Treasury Securities				
Other				
Total Personal Property				