WORKSHEET

Personal Financial Statements

BANK ACCOUNTS

Checking (Primary):	Other:
Checking (Joint):	Other:
Savings:	Other:
Other:	Other:

INVESTMENT ACCOUNTS

Amuni Brokerage / Advisory:	Other:
Brokerage / Advisory:	Other:
Brokerage / Advisory:	Other:
Other:	Other:

RETIREMENT ACCOUNTS

401(k) (Current Employer):	Other:
401(k) (Former Employer):	Other:
Roth IRA:	Other:
Traditional IRA:	Other: