



# Quarterly Financial Check-up

- THE CONNECTED SEASON -

ASSETS		
	ACCOUNT	TOTAL
Checking Accounts		
Savings Accounts		
Emergency Fund		
HSA/FSA		
Traditional IRAs		
Roth IRA		
401K/403b		
Investment Portfolio		
Home Equity		
Other:		
TOTAL		
LIABILITIES		
Credit Card Debt		
Car Loans		
Student Loans		
Mortgage		
Other Debts		
TOTAL		
NET WORTH = \$		

Date: \_\_\_\_\_