

# Personal finance worksheet

## Current employer-provided insurance benefits

	Life insurance	Long-term disability insurance (% or \$)	Short-term disability insurance (% or \$)
You	<hr/>	<hr/>	<hr/>
Partner	<hr/>	<hr/>	<hr/>

## Employer-sponsored retirement plan benefits

	Retirement plan balance	Your pre-tax contribution (% or \$)	Your post-tax contribution (% or \$)	Employer retirement plan match
You	<hr/>	<hr/>	<hr/>	<hr/>
Partner	<hr/>	<hr/>	<hr/>	<hr/>

## Other retirement and savings accounts

	Previous employer-sponsored retirement plan(s) balance(s)	IRA balance	Savings account balance	Other balances (mutual funds, CDs, College funding)
You	<hr/>	<hr/>	<hr/>	<hr/>
Partner	<hr/>	<hr/>	<hr/>	<hr/>

## Retirement income sources (projected income)

	Social Security	Defined benefit/pension	Other
You	<hr/>	<hr/>	<hr/>
Partner	<hr/>	<hr/>	<hr/>

## Additional insurance

	Face amount of personal life insurance	Benefit amount of personal disability insurance	Health insurance	Dental insurance	Vision insurance
You	<hr/>	<hr/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Partner	<hr/>	<hr/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Children	<hr/>	<hr/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Budget/household spending

Monthly expenses		Balance
Mortgage/rent		
Transportation <small>(car loans, gas, insurance)</small>		
Credit card(s)		
Student loan(s)		
Home equity loan/ line of credit		
Utilities		
Child care		
Investments and insurance		
Other <small>(food, entertainment)</small>		
Total		

Notes

Record your goals as well as upcoming action items to help you achieve those goals.



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