PERSONAL FINANCIAL ORGANIZER

Name(s):

Asset Summary

Cash Accounts (savings, checking, CDs, money markets, etc.)		Account Description	Value	How Titled
	1			
	2			
	3			
	4			

Taxable Investment Accounts (not retirement accounts)		Account Description	Value	Tax Basis	How Titled
	1				
	2				
	3				
	4				

Retirement Accounts (401k, IRA, 403b etc.)		Account Description	Value	Beneficiary	Owner
	1				
	2				
	3				
	4				

Real Estate		Property Description	Value	Tax Basis	How Titled
	1				
	2				
	3				
	4				

Business Interests		Business Description	Value	Tax Basis	How Titled
	1				
	2				
	3				
	4				

Life Insurance		Policy Description & Owner	Cash Value	Death Benefit	Beneficiary
	1				
	2				
	3				
	4				

Deferred Annuities (annuities in the accumulation phase)		Annuity Description & Owner	Value	Tax Basis	Beneficiary
	1				
	2				
	3				
	4				

Other Assets or Resources		Description of Other Assets	Value
	1		
	2		
	3		
	4		

Debt Summary

		Description of Liabilities	Balance	Interest Rate	Payment
Liabilities (mortgages, personal loans, student loans, consumer debt)	1				
	2				
	3				
	4				
	5				

Income Summary

		Current Social Security Benefits or Estimated Future Benefits
Social Security	1	
	2	

		Current Pension Income or Estimated Future Benefits	Inflation Adjustments?	Survivorship Interest?
Pensions	1			
	2			
	3			

		Current Earnings from Employment
Employment Income	1	
	2	

		Current Income from Any Annuitized Annuity Contract
Annuity Income (for annuitized contracts)	1	
	2	
	3	

		Detail Other Sources of Income
Other Income (rental income, alimony, business income, etc.)	1	
	2	
	3	
	4	

Notes

TD Wealth

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