

List of Assets

Student Name: _____

Cash	
Checking Account 1	
Checking Account 2	
Savings Account 1	
Savings Account 2	
Money Market Account 1	
Money Market Account 2	
Other Cash Accounts	
Total Cash	
Stocks/Bonds (current value)	
Stocks - Student	
Stocks - Spouse	
Bonds - Student	
Bonds - Spouse	
Total Stocks/Bonds	
Retirement Accounts (current value)	
IRA - Student	
IRA - Spouse	
401(k) - Student	
401(k) - Spouse	
403(b) - Student	
403(b) - Spouse	
Other Retirement Account - Student	
Other Retirement Account - Spouse	
Total Retirement Accounts	\$ -