

FINANCIAL PLANNING WORKSHEET

Date _____ SSN _____ Rate _____
 Name _____ Age _____
 Pay Grade _____ Yrs. in Svc. _____ Date Reported/PRD (Transfer) _____
 Marital Status _____ Spouse's Name _____ Age _____
 Spouse's Place of Employment _____
 Number of Children and Ages _____
 Home Address _____
 Work Telephone _____ Home Telephone _____
 Command & Referred By (Self, CMD, NMCRS, FFSC, etc.) _____
 Amount of SGLI Elected _____ Amount of FSGLI Elected _____
 TSP Monthly Contribution _____ MGB Monthly Contribution _____

STATEMENT OF NET WORTH

ASSETS

Cash on hand \$ _____
 Checking Accounts \$ _____
 Savings Accounts \$ _____
 Certificates of Deposit \$ _____
 Cash Value of Life Insurance \$ _____
 U.S. Savings Bonds \$ _____
 Mutual Funds/Money Market \$ _____
 Stocks/Bonds \$ _____
 College Funds \$ _____
 401(k)/403(b)/TSP \$ _____
 Other (IRAs, etc.) \$ _____

Real Estate (Market Value)

Home \$ _____
 Rental Property \$ _____
 Other (vacation home/trailer/time share) \$ _____

Personal Property

Vehicles/Motorcycles/Boats \$ _____
 Furniture \$ _____
 Jewelry \$ _____
 Other (collectibles, etc.) \$ _____

Counseling Provided By: _____
 Counselor Phone #: _____
 Appointment Date: _____ Time: _____
 Place: _____

LIABILITIES

Signature Loans \$ _____
 Auto Loans or Leases \$ _____
 Consolidation Loans \$ _____
 Student Loans \$ _____
 NEX/AAFES (Star Card) \$ _____
 Department Store Credit Cards \$ _____
 Other Credit Cards \$ _____
 NMCRS (loan) \$ _____
 Other (friends, relatives, etc.) \$ _____
 Advance/overpayments \$ _____

Mortgages-Balances Due

Home \$ _____
 Rental Property \$ _____
 Other (vacation home/trailer/time share) \$ _____

TOTAL ASSETS	\$ _____
TOTAL LIABILITIES	\$ _____
NET WORTH (Assets - Liabilities)	\$ _____

Personal Financial Planning Worksheet Essays

Elaine Marmel



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Table of Contents Personal Financial Planning Worksheet Essays

1. Understanding the eBook Personal Financial Planning Worksheet Essays
 - The Rise of Digital Reading Personal Financial Planning Worksheet Essays
 - Advantages of eBooks Over Traditional Books
2. Identifying Personal Financial Planning Worksheet Essays
 - Exploring Different Genres
 - Considering Fiction vs. Non-Fiction
 - Determining Your Reading Goals
3. Choosing the Right eBook Platform
 - Popular eBook Platforms
 - Features to Look for in an Personal Financial Planning Worksheet Essays
 - User-Friendly Interface
4. Exploring eBook Recommendations from Personal Financial Planning Worksheet Essays
 - Personalized Recommendations
 - Personal Financial Planning Worksheet Essays User Reviews and Ratings
 - Personal Financial Planning Worksheet Essays and Bestseller Lists

5. Accessing Personal Financial Planning Worksheet Essays Free and Paid eBooks
 - Personal Financial Planning Worksheet Essays Public Domain eBooks
 - Personal Financial Planning Worksheet Essays eBook Subscription Services
 - Personal Financial Planning Worksheet Essays Budget-Friendly Options
6. Navigating Personal Financial Planning Worksheet Essays eBook Formats
 - ePub, PDF, MOBI, and More
 - Personal Financial Planning Worksheet Essays Compatibility with Devices
 - Personal Financial Planning Worksheet Essays Enhanced eBook Features
7. Enhancing Your Reading Experience
 - Adjustable Fonts and Text Sizes of Personal Financial Planning Worksheet Essays
 - Highlighting and Note-Taking Personal Financial Planning Worksheet Essays
 - Interactive Elements Personal Financial Planning Worksheet Essays
8. Staying Engaged with Personal Financial Planning Worksheet Essays
 - Joining Online Reading Communities
 - Participating in Virtual Book Clubs
 - Following Authors and Publishers Personal Financial Planning Worksheet Essays
9. Balancing eBooks and Physical Books Personal Financial Planning Worksheet Essays
 - Benefits of a Digital Library
 - Creating a Diverse Reading Collection Personal Financial Planning Worksheet Essays
10. Overcoming Reading Challenges
 - Dealing with Digital Eye Strain
 - Minimizing Distractions
 - Managing Screen Time
11. Cultivating a Reading Routine Personal Financial Planning Worksheet Essays
 - Setting Reading Goals Personal Financial Planning Worksheet Essays
 - Carving Out Dedicated Reading Time
12. Sourcing Reliable Information of Personal Financial Planning Worksheet Essays
 - Fact-Checking eBook Content of Personal Financial Planning Worksheet Essays
 - Distinguishing Credible Sources
13. Promoting Lifelong Learning

- Utilizing eBooks for Skill Development
- Exploring Educational eBooks

14. Embracing eBook Trends

- Integration of Multimedia Elements
- Interactive and Gamified eBooks

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