

Form 3: What's your current status?

This Personal Balance Sheet corresponds to Figure 2.4 in How Much Is Enough? Enter your assets and liabilities and it will calculate your net worth right now.

PERSONAL BALANCE SHEET

ASSETS

VALUE

Liquid

Cash

Canada Savings Bonds

Life insurance cash values

Guaranteed Investment Certificates

Short term deposits

Other

Semi-liquid

Total personal RRSP

Group RRSPs through employment

Bonds, preferred shares

Mutual funds, common stock

Investment real estate

Mortgages

Annuities

Bonus plans

Income averaging annuities

Other

Fixed (current total values)

Residence

Seasonal residence

Business interest/ professional practice

Other assets

Projected pension income

My pension income will be indexed

Current age

Retirement age