



## The Millionaire Nurse Financial Intake Assessment

The Financial Intake Assessment, also known as, the financial statement is a documentation of your current financial status. It is used to determine your “net worth”. Net worth is a number you should follow over time to determine whether you are improving your financial situation, and building wealth.

Assets (Value of things you own)	
Home	
Savings Account Balances	
Cash in Checking Account	
Retirement Savings	
Cars	
Cash Value of Life Insurance Policies (Check with your agent)	
Boat, ATV's, Motorcycles	
Household Goods (Furniture, Etc.)	
Guns	
Jewelry	
TOTAL:	

Liabilities (What you owe on the above or other debts)	
Home Mortgage Balance	
Second Mortgage or Home Equity	
Car Loan Balance	
Personal Loans	
Credit Card Debt	
School Loans	
Consumer Loans (Television, Furniture, Etc.)	
TOTAL:	

Subtract top total (assets), from bottom total (liabilities), to obtain your “net worth”.