#### Own/Owe lists

List down all of major the things that you own (your assets) and all the things that you owe (your liabilities):

|  |  |
| --- | --- |
| **What I Own Real Estate Assets** | |
| **Description** | **Estimated Value** |
| Family Home |  |
| Holiday Home |  |
| Investment Property |  |

|  |  |
| --- | --- |
| **Motor Vehicle Assets** | |
| **Description** | **Estimated Value** |
| Car 1 |  |
| Car 2 |  |
| Motorcycle |  |
| Caravan |  |
| Boat |  |

|  |  |
| --- | --- |
| **Personal Assets** | |
| **Description** | **Estimated Value** |
| Home Contents |  |
| Collectibles |  |
| Other |  |
| Other |  |

|  |  |
| --- | --- |
| **Investment Assets** | |
| **Description** | **Estimated Value** |
| Emergency Fund |  |
| Savings - 1 |  |
| Savings - 2 |  |
| Savings - 3 |  |
| Share Portfolio |  |
| Managed Funds |  |
| Other Investments |  |

|  |  |
| --- | --- |
| **Superannuation Assets** | |
| **Description** | **Estimated Value** |
| Superannuation 1 |  |
| Superannuation 2 |  |
| Superannuation 3 |  |
|  |  |

|  |  |
| --- | --- |
| **What I Owe Real Estate Loans** | |
| **Description** | **Balance**  **$** |
| Home Loan 1 |  |
| Investment Loan 1 |  |
| Holiday home Loan |  |

|  |  |
| --- | --- |
| **Motor Vehicle Loans** | |
| **Description** | **Balance**  **$** |
| Car Loan 1 |  |
| Car Loan 2 |  |
| Vehicle Loan |  |

|  |  |
| --- | --- |
| **Personal Loans** | |
| **Description** | **Balance**  **$** |
| Personal Loan 1 |  |
| Personal Loan 2 |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Credit Cards and Store Cards** | | | | | |
| **Description** | | **Credit Limit** | | **Balance** | |
| Credit card 1 | |  | |  | |
| Credit card 2 | |  | |  | |
| Credit card 3 | |  | |  | |
| Store card | |  | |  | |

|  |  |
| --- | --- |
| **Other Debts** | |
| **Description** | **Balance** |
| HECS/HELP Debt - 1 (me) |  |
| HECS/HELP Debt - 2 (my partner) |  |
| Other Debts |  |
| Other Debts |  |