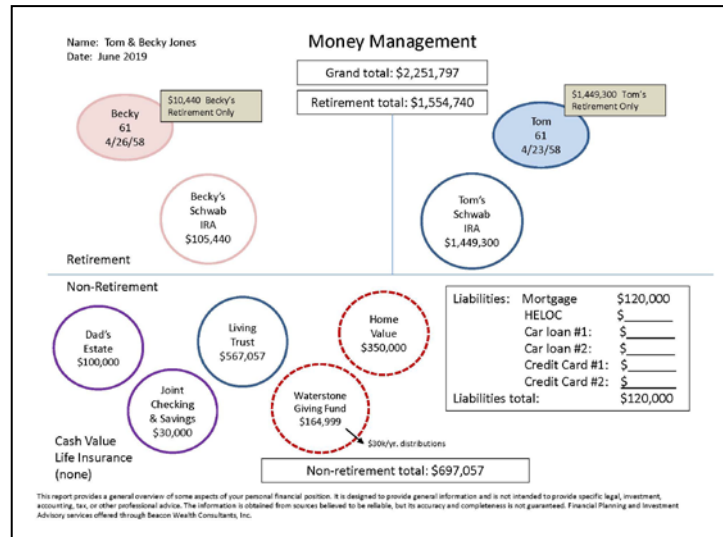




The circle chart is intended to provide a one-page visual of their assets and liabilities as well as sources of cash flow so they can see their net worth & income on a simplified one-page visual.

Circle Chart

[Click on this image to download a sample Circle Chart](#)



[Click on this image to download a blank Circle Chart template.](#)

Name: _____
Date: _____

Money Management

Grand total: \$ _____
Retirement total: \$ _____
Non-retirement total: \$ _____

Retirement Assets:

- Becky's Retirement Only: \$ _____
- Becky's Retirement Only: \$ _____
- Becky's Retirement Only: \$ _____
- Becky's Retirement Only: \$ _____
- Tom's Retirement Only: \$ _____
- Tom's Retirement Only: \$ _____
- Tom's Retirement Only: \$ _____
- Tom's Retirement Only: \$ _____

Non-Retirement Assets:

- Joint Checking: \$ _____
- Joint Savings: \$ _____
- Home Value: \$ _____

Liabilities:

- Mortgage: \$ _____
- HELOC: \$ _____
- Car loan #1: \$ _____
- Car loan #2: \$ _____
- Credit Card #1: \$ _____
- Credit Card #2: \$ _____
- Liabilities total: \$ _____

Cash Value / Life Insurance: _____

This report provides a general overview of some aspects of your personal financial position. It is designed to provide general information and is not intended to provide specific legal, investment, accounting, tax, or other professional advice. The information is obtained from sources believed to be reliable, but its accuracy and completeness is not guaranteed. Financial Planning and investment Advisory services offered through Beacon Wealth Consultants, Inc., an Investment Adviser registered with the US Securities and Exchange Commission.