

Financial Flex Sheet

Credit Cards – This will be used to help you see your current credit situation clearer and possibly make positive changes if needed to increase your overall financial access

Card Name	Current Balance	Available Credit	Card Total
Visa	\$3,500	\$6,500	\$10,000

Assets – Assets are anything of tangible value owned by you. Ex. Jewelry, Guns, Gold, Silver, ATVS and Utility vehicles, Trailers, Tools, Art, Furnisher, electronics and Toys.

Asset Type	Estimated Value	Debt Amount
Home (use Zestimate)		
Vehicle 1 (use		
Vehicle 2		
Vehicle 3		
Other		
Other		

Asset (>\$500) _____
 Asset (>\$500) _____
 Asset (>\$500) _____
 Asset (>\$500) _____
 Asset (>\$500) _____
 Asset (>\$500) _____
 Asset (>\$500) _____

Insurance –
 Cash Value in Whole Life or Variable Life Policy _____
 Annuities _____

Retirement Vehicles -
 401k _____
 Mutual Fund _____
 IRA _____

Other –
 Anything else you would consider an asset _____

