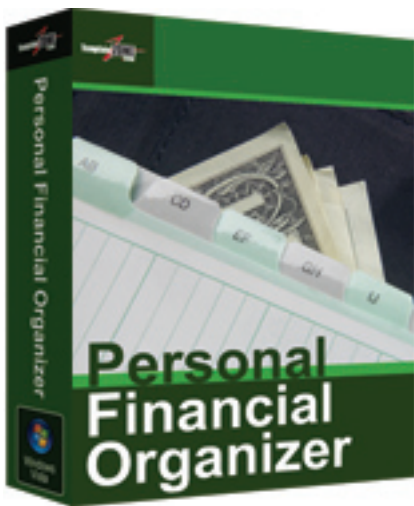


# Personal Financial Organizer

The Personal Financial Organizer contains 26 essential worksheets to help you organize your personal financial situation. In one integrated Excel workbook, you can have the structure and the format needed to prepare a personal balance sheet, keep track of all your assets and liabilities, record critical data regarding your pensions and retirement accounts, insurance policies, personal goals, and inventory your most important documents.

Once completed, this organizer gives you a valuable and easy to update reference upon which you can base important financial decisions and plans. The Personal Financial Organizer was developed by a financial planner after more than 15 years of experience helping people gather and analyze personal financial data. Each worksheet has been designed with real people's needs in mind. They are practical, straightforward and easy to use.



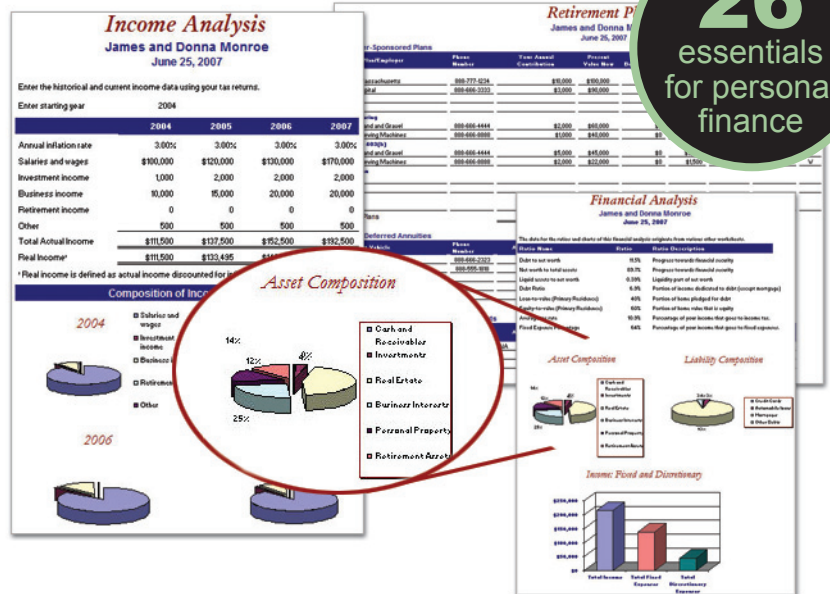
## What's Included



### Worksheets to help you capture ...

- |                          |                              |
|--------------------------|------------------------------|
| Personal & Family Data   | Personal Assets              |
| Dependents and Others    | Liabilities                  |
| Personal Financial Goals | Balance Sheet                |
| Education and Retirement | Income and Expenses          |
| Estate Data              | Income Analysis              |
| Planning Needs           | Financial Analysis           |
| Cash and Receivables     | Life Insurance               |
| Bonds                    | Disability Insurance         |
| Stocks and Options       | Property Insurance           |
| Mutual Funds             | Umbrella Liability Insurance |
| Real Estate              | Automobile Insurance         |
| Business Interests       | Advisors                     |
| Retirement Plans         | Important Documents          |

**26**  
essentials  
for personal  
finance



## How PFO can help you

You can use the workbook to prepare personal financial statements and do some basic financial analysis. The PFO also keeps track of your insurance coverage, the location of important documents, your PINs, and contact information for your advisors.

Reasons why you should periodically prepare financial statements include:

- To monitor your **financial health**.
- To monitor your **creation of wealth (net worth)**.
- To present information to your CPA, financial advisor and attorney for **income tax and estate tax planning**.
- To prepare financial statements for **personal & business loans**.

Use the PFO to carry out the first step of personal financial planning. Personal Financial Planning begins with data-gathering. No strategy should be devised and no plan should be written until you first know where you stand. The Personal Financial Organizer helps you to see where you stand and to jump-start the financial planning process. Included is a comprehensive e-book that will help you create a strong foundation for an effective financial plan.