

# ME, INC. BI-ANNUAL FINANCIAL CHECKUP

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Name: \_\_\_\_\_

Date of Analysis: \_\_\_\_\_

Next Analysis (6-Months): \_\_\_\_\_

MONTHLY INCOME		MONTHLY EXPENSES		INCOME STATEMENT
Item	Amount	Item	Amount	
	\$		\$	TOTAL INCOME: \$
	\$		\$	
	\$		\$	-TOTAL EXPENSES: \$
	\$		\$	-----
	\$		\$	<b>PROFIT OR LOSS: \$</b> _____
	\$		\$	<b>(should be greater than zero)</b>
	\$		\$	(or exactly 0 if you put money into savings)
	\$		\$	
	\$		\$	<b>EMERGENCY RATIO:</b> _____
	\$		\$	(Divide emergency savings by monthly expenses.
	\$		\$	Should be 3 – 6. Less than 1 is SUPER risky.
ADDITIONAL EXPENSES BELOW				
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
<b>TOTAL:</b>	\$	<b>INCOME</b>	<b>MINUS</b>	\$
			<b>EXPENSES</b>	<b>= \$</b>
				<b>PROFIT/LOSS</b>

ASSETS		LIABILITIES (DEBTS)		BALANCE SHEET
Item	Amount	Item	Amount	
Checking Accounts	\$		\$	TOTAL ASSETS: \$
Life Insurance Cash Value	\$		\$	
Emergency Savings Account	\$		\$	-TOTAL LIABILITIES: \$
IRA(s), 401K, etc.	\$		\$	-----
Precious Metals	\$		\$	<b>NET WORTH: \$</b> _____
Treasury Securities	\$		\$	<b>(should be significantly greater than zero)</b>
Stock Market	\$		\$	
Real Estate	\$		\$	
Other Savings Accounts	\$		\$	<b>NOTE:</b> Student loans are liabilities, but don't use them to calculate your net worth
Other Retirement Accounts	\$		\$	<b>NOTE:</b> Register at <a href="http://www.ssa.gov">www.ssa.gov</a> and verify if you have already been approved for Social Security, and if so, for how much at age 70.
Vehicles	\$		\$	<b>NOTE:</b> Visit <a href="http://www.AnnualCreditReport.com">www.AnnualCreditReport.com</a> (government website. It's the free way to check)
Other	\$		\$	
	\$		\$	
	\$		\$	
	\$		\$	
<b>TOTAL:</b>	\$	<b>ASSETS</b>	<b>MINUS</b>	\$
			<b>DEBTS</b>	<b>= \$</b>
				<b>NET WORTH</b>

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**REFERENCES:** For a more in-depth analysis and to help you create a clear 6-month, 1-year, and 3-year financial plan, please set up a comprehensive financial planning session now for \$450. This template is based on the various philosophies of (and in the following books by) Monroe Mann, available on Amazon: *T.R.U.S.T.*, *The Theatrical Juggernaut*; *Time Zen*; *H.O.P.E. (coming soon)*, *I.N.V.E.S.T.O.R. (coming soon)*, and others. Feel free to share this bi-annual checkup with friends.