

# 5 Minute Future Tool

Welcome to the Geauga Savings Bank Interactive 5 Minute Future Tool. We hope you'll find that this worksheet makes visualizing your current financial picture a breeze. Once completed, this worksheet will provide you with an overview of your financial situation and assist you in making plans to create the financial future you deserve.

This tool is absolutely free for you to use. Furthermore, once you complete this form you can email it to one of our financial experts for our analysis on your financial situation.

## Instructions

### Step 1: Assets

In the Asset Section, you'll find easy to answer questions that help you identify all of your financial resources and will automatically calculate your total assets. Having a copy of your pay stub, bank statements and any other documents that show money that has been paid to you will make competing this page quick and easy.

### Step 2: Liabilities

In the Liabilities Section, you will list all of your monthly expenses and automatically calculate your total expenditures (liabilities). Having copies of your most recent monthly bills and credit card statements is very helpful when completing this section.

After you have entered your total assets and liabilities, your current net worth will appear at the bottom of your worksheet. Net worth is simply the difference between your assets and your liabilities calculated by month.

### Step 3: Submit

Once you have completed both the Assets and Liabilities section, you have the option to submit your form to a financial expert at Geauga Savings for their analysis of your financial situation. Once you click submit, your form and information will be sent via email to one of our financial experts. If you wish to be contacted with our analysis you must provide your contact information in the Submission Section.

We also suggest to either print a copy for your records or simply save the file to your computer.



*Your Full Service Bank!*



# Section One: Assets



## CASH

On Hand	\$ _____
Checking Accounts	\$ _____
Savings Accounts	\$ _____
Money Markets	\$ _____
Other	\$ _____

## REAL ESTATE PROPERTY

Principal Residence	\$ _____
Second Residence	\$ _____
Land	\$ _____
Income Property	\$ _____
Other	\$ _____

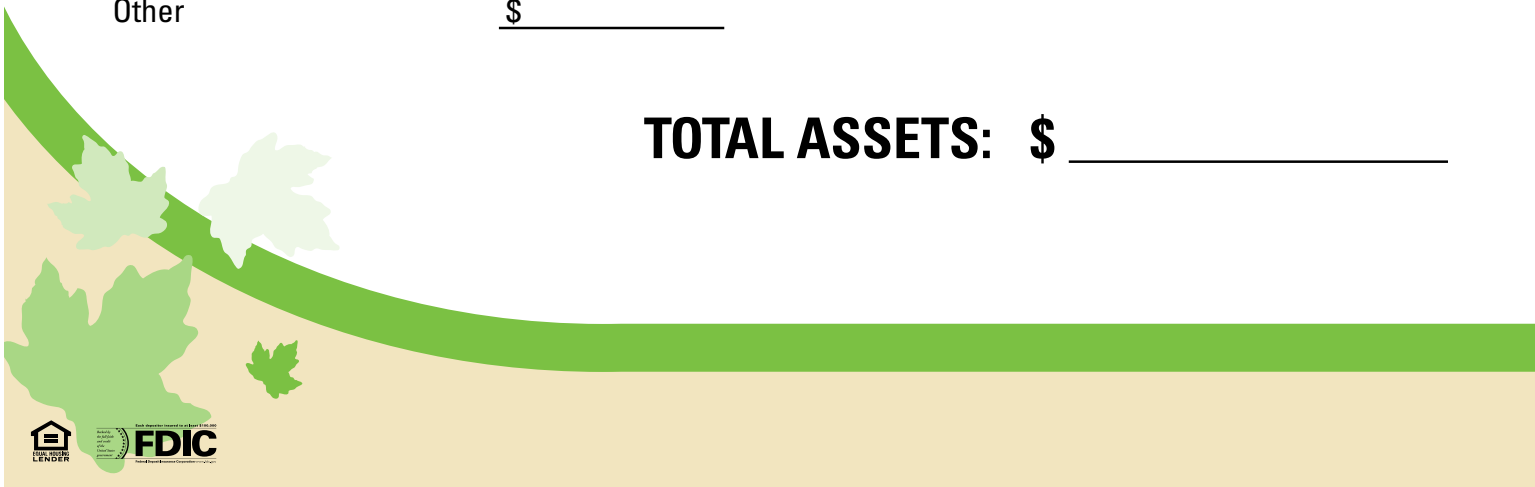
## INVESTMENTS (Market Value)

Cash Value Life Insurance	\$ _____
Certificates of Deposit	\$ _____
T-Bills/Savings Bonds	\$ _____
Stocks	\$ _____
Bonds	\$ _____
Mutual Funds	\$ _____
Limited Partnerships	\$ _____
Annuities	\$ _____
IRA-Regular/Roth/Keogh	\$ _____
401(k), 403(b), 457 Plans	\$ _____
Pension Plan/Retirement	\$ _____
Other	\$ _____

## PERSONAL PROPERTY (Present Value)

Automobiles, Vehicles	\$ _____
Recreational Vehicles/Boat	\$ _____
Electronic Equipment	\$ _____
Home Furnishings	\$ _____
Home Entertainment Equip.	\$ _____
Appliances and Furniture	\$ _____
Collectibles/Antiques	\$ _____
Jewelry and Furs	\$ _____
Other	\$ _____

**TOTAL ASSETS: \$ \_\_\_\_\_**



# Section Two: Liabilities



## MORTGAGES

Principal Residence	\$ _____
Second Residence	\$ _____
Land	\$ _____
Income Property	\$ _____
Other	\$ _____

## LOANS

Home Equity	\$ _____
Bank/Finance Company	\$ _____
Bank/Finance Company	\$ _____
Automobiles, Vehicles	\$ _____
Recreational Vehicle/Boat	\$ _____
Education/Student	\$ _____
Life Insurance	\$ _____
Personal (family/friends)	\$ _____
Retirement Accounts	\$ _____
Other	\$ _____

## CURRENT DEBTS

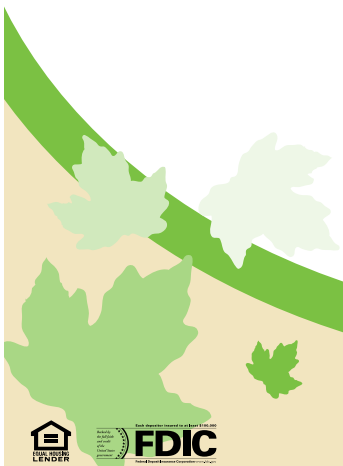
Household	\$ _____
Medical	\$ _____
Credit Cards	\$ _____
Department Store Cards	\$ _____
Back Taxes	\$ _____
Legal	\$ _____
Child Support	\$ _____
Alimony	\$ _____
Other	\$ _____

## PROTECTING YOUR NET WORTH

Life Insurance	\$ _____
Disability Insurance	\$ _____
Long-Term Care Insurance	\$ _____
Homeowner	\$ _____

**TOTAL LIABILITIES: \$ \_\_\_\_\_**

**CURRENT NET WORTH: \$ \_\_\_\_\_**



# Section Three: Submit



## You've Earned a Complementary Review!

Submit Your Financial Future

Once you have completed the 5 Minute Financial Future Tool, we encourage you to submit your form to our experts at Geauga Savings Bank for a FREE complementary review and analysis of your financial situation. We'll provide suggestions on how to increase your net worth in the short and long term.

To submit this form, fill out your contact information in the field below and click the "Submit" button.

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

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

I prefer to be contacted by:  Phone  Email  Mail

Comments

