

**WEALTH REGENERATION AT RETIREMENT
PLANNING FOR A LIFETIME OF LEADERSHIP**

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Chapter 7 Toolkit

We have included examples of the worksheets and tools you will need to implement in this chapter:

- 1. Balance Sheet for Financial Capital
- 2. Balance Sheet for Human Capital
- 3. Possible Spending Categories

If you go to our website at WWW.LAIRDNORTONWM.COM you can register to download copies of the worksheets and exercises.

Worksheet 1: Balance Sheet for Financial Capital

Date at:

	Assets	Liabilities	Comments/Actions
Liquid Assets			
Retirement Assets			
Other Investment and Business Assets			
Personal Assets			
TOTALS:			
NET WORTH:			

Directions:

- List all your personal assets and liabilities according to their category.
- Draw down totals.
- Net worth is equal to total assets minus total liabilities.