

TRACK WHAT YOU OWN. BUILD WHAT GROWS.

Use this tracker to organize the assets you own, understand what they are doing for you, and identify where your wealth-building base can become stronger.

1 CURRENT ASSET INVENTORY

ASSET	CATEGORY	EST. VALUE	OWNERSHIP	INCOME / GROWTH

2 ASSET MIX CHECK

CASH / RESERVES
Est. value: \$_____

INVESTMENTS
Est. value: \$_____

BUSINESS / IP
Est. value: \$_____

REAL / PHYSICAL
Est. value: \$_____

3 WHAT ARE YOUR ASSETS DOING?

Which asset currently produces income or appreciates most consistently?

Which asset is underused, idle, or not performing as expected?

Where are you overconcentrated, and where are you underbuilt?

4 ASSET GROWTH PLAN

Choose the assets that deserve attention, capital, protection, or a clearer growth strategy.

ASSET	CURRENT VALUE	12-MO. TARGET	NEXT ACTION	REVIEW DATE

5 OWNERSHIP & PROTECTION CHECK

- ☐ Ownership/title or account records are current
- ☐ Beneficiaries, access, or succession details are documented
- ☐ Insurance or other protection is appropriate
- ☐ Taxes, fees, debt, or carrying costs are understood
- ☐ Key records are stored where I can find them

6 NEXT ASSET TO BUILD OR STRENGTHEN

ASSET / OPPORTUNITY	WHY IT MATTERS	FIRST MOVE	TARGET DATE

7 BUILDER'S NEXT MOVE

One asset-building action I will complete in the next 30 days:

WEALTH IS BUILT THROUGH OWNERSHIP.

Track what you own, strengthen what grows, and build assets with intention.