

Statement of Net Worth

ASSETS	VALUE
Liquid Assets	
Cash	\$
Checking accounts	\$
Savings accounts	\$
Money market accounts	\$
CDs/Savings bonds	\$
Cash value of life insurance	\$
Personal Assets	
Home	\$
2nd Home	\$
Home furnishings	\$
Auto #1	\$
Auto #2	\$
Other recreational vehicles	\$
Collectibles/art	\$
Jewelry/coins	\$
Other personal assets	\$
Investments	
Rental home	\$
Brokerage accounts	\$
IRAs/Roth IRAs	\$
401(k)/457(b)/403(b) plans	\$
Annuity (accumulated value)	\$
Pension (vested portion)	\$
Other investments	\$
TOTAL ASSETS	\$

LIABILITIES	BALANCE
Current Liabilities	
Credit card #1	\$
Credit card #2	\$
Other credit cards	\$
Utility payment	\$
Other bills	\$
Current taxes owed	\$
Short-term medical loans	\$
Other short-term loans	\$
Long-Term Liabilities	
Auto loan #1	\$
Auto loan #2	\$
Recreational vehicle loan	\$
Educational loan	\$
Home mortgage	\$
2nd Home mortgage	\$
Equity line of credit	\$
Equity loan	\$
Personal loan	\$
Life insurance loan	\$
Medical loans	\$
TOTAL LIABILITIES	\$

NET WORTH	VALUE
TOTAL ASSETS	\$
LESS: TOTAL LIABILITIES	\$
NET WORTH	\$