

Net Worth Worksheet

DATE:

ASSETS	VALUE
PERSONAL POSSESSIONS	
Cash	
Money in Checking	
Market Value of Home	
Market Value of Vacation Home	
Market Value of Any Businesses	
Furniture	
Art, Antiques & Collectibles	
Jewelry	
Resale Value of Car 1	
Resale Value of Car 2	
Boats or Other Recreational Vehicles	
Other:	
SAVINGS AND INVESTMENTS	
Money in Savings Accounts	
Money in Emergency Fund	
Certificates of Deposit (CDs)	
Money Market Accounts	
Annuities	
Cash Value of Life Insurance	
Stocks	
Bonds	
Mutual Funds	
Real Estate	
Other:	
RETIREMENT SAVINGS	
Employee Pension	
401k or 403(b) Accounts	
IRA Accounts	
Keogh Accounts	
Other:	
TOTAL ASSETS	

LIABILITIES	BALANCE
DEBTS	
Mortgage	
Vacation Home Mortgage	
Home Equity Loan	
Car Loan 1	
Car Loan 2	
Credit Card 1	
Credit Card 2	
Credit Card 3	
Student Loans	
Bank Loans	
Private Loans (friends and family)	
Cash Advances	
Medical Bills	
Taxes Owed	
Alimony/ Child Support Owed	
Other Debt 1	
Other Debt 2	
TOTAL LIABILITIES	
TOTAL ASSETS	
TOTAL LIABILITIES	
TOTAL NET WORTH (ASSETS MINUS LIABILITIES)	