

Your Personal Net Worth Statement

Name

Date

ASSETS (Everything you OWN)

Personal Property

Home	\$	
Car 1	\$	
Car 2	\$	
Boat/Toy	\$	
Vacation Home	\$	
Real Estate	\$	
Businesses	\$	
Other	\$	

Investment Accounts

Retirement Accounts

401k(s)	\$	
ESOP	\$	
Pensions	\$	
Roth IRAs	\$	
Traditional IRAs	\$	
SIMPLE IRAs	\$	
SEP IRAs	\$	
Other	\$	

Non-Retirement

Brokerage Account(s)	\$	
Business Interest	\$	
Other	\$	

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ASSETS (Everything you OWN) Continued

Cash and Cash Equivalents

Checking Account(s)	\$	
Savings Account(s)	\$	
Money Market Accounts	\$	
CD's	\$	
Cash Value of Life Insurance	\$	
Other	\$	

LIABILITIES (Everything you OWE)

Debt

Mortgage	\$	
Home Loan or HELOC	\$	
Car Loan(s)	\$	
Student Loans	\$	
Credit Card Loans	\$	
Life Insurance Policy Loan	\$	
Other property loans	\$	
I.O.U.s	\$	
Businesses	\$	
Other	\$	