

Your Personal Net Worth Statement

Name

Date

ASSETS (Everything you OWN)

Personal Property

| | | |
|--------------------------------|-----------|---|
| Home | \$ | <input style="width: 95%; height: 20px;" type="text"/> |
| Car 1 | \$ | <input style="width: 95%; height: 20px;" type="text"/> |
| Car 2 | \$ | <input style="width: 95%; height: 20px;" type="text"/> |
| Boat/Toy | \$ | <input style="width: 95%; height: 20px;" type="text"/> |
| Home Furnishings | \$ | <input style="width: 95%; height: 20px;" type="text"/> |
| Electronics | \$ | <input style="width: 95%; height: 20px;" type="text"/> |
| Vacation Home | \$ | <input style="width: 95%; height: 20px;" type="text"/> |
| Real Estate | \$ | <input style="width: 95%; height: 20px;" type="text"/> |
| Businesses | \$ | <input style="width: 95%; height: 20px;" type="text"/> |
| Other | \$ | <input style="width: 95%; height: 20px;" type="text"/> |
| Total Personal Property | \$ | <input style="width: 95%; height: 20px; border-bottom: 3px double black;" type="text"/> |

Investment Accounts

Retirement Accounts

| | | |
|------------------|----|--|
| 401k(s) | \$ | <input style="width: 95%; height: 20px;" type="text"/> |
| ESOP | \$ | <input style="width: 95%; height: 20px;" type="text"/> |
| Pensions | \$ | <input style="width: 95%; height: 20px;" type="text"/> |
| Roth IRAs | \$ | <input style="width: 95%; height: 20px;" type="text"/> |
| Traditional IRAs | \$ | <input style="width: 95%; height: 20px;" type="text"/> |
| SIMPLE IRAs | \$ | <input style="width: 95%; height: 20px;" type="text"/> |
| SEP IRAs | \$ | <input style="width: 95%; height: 20px;" type="text"/> |
| Other | \$ | <input style="width: 95%; height: 20px;" type="text"/> |

Non-Retirement

| | | |
|----------------------------------|-----------|---|
| Brokerage Account(s) | \$ | <input style="width: 95%; height: 20px;" type="text"/> |
| Business Interest | \$ | <input style="width: 95%; height: 20px;" type="text"/> |
| Other | \$ | <input style="width: 95%; height: 20px;" type="text"/> |
| Total Investment Accounts | \$ | <input style="width: 95%; height: 20px; border-bottom: 3px double black;" type="text"/> |



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ASSETS (Everything you OWN) Continued

Cash and Cash Equivalents

| | | |
|------------------------------------|----|----------------------|
| Cash on Hand | \$ | <input type="text"/> |
| Checking Account(s) | \$ | <input type="text"/> |
| Savings Account(s) | \$ | <input type="text"/> |
| Money Market Accounts | \$ | <input type="text"/> |
| CD's | \$ | <input type="text"/> |
| Cash Value of Life Insurance | \$ | <input type="text"/> |
| Other | \$ | <input type="text"/> |
| Total Cash/Cash Equivalents | \$ | <input type="text"/> |

TOTAL ASSETS \$

LIABILITIES (Everything you OWE)

Debt

| | | |
|----------------------------|----|----------------------|
| Mortgage | \$ | <input type="text"/> |
| Home Loan or HELOC | \$ | <input type="text"/> |
| Car Loan(s) | \$ | <input type="text"/> |
| Student Loans | \$ | <input type="text"/> |
| Credit Card Loans | \$ | <input type="text"/> |
| Life Insurance Policy Loan | \$ | <input type="text"/> |
| Other property loans | \$ | <input type="text"/> |
| I.O.U.s | \$ | <input type="text"/> |
| Businesses | \$ | <input type="text"/> |
| Other | \$ | <input type="text"/> |

Total Liabilities \$

NET WORTH \$

All Assets minus All Liabilities

