Your Personal Net Worth Statement

Name

Date

ASSETS (Everything you OWN)

Personal Property

Home Car 1 Car 2 Boat/Toy Home Furnishings Electronics Vacation Home Real Estate Businesses Other Total Personal Propert

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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	\$			
Total Investment Accounts \$				



Your Personal Net Worth Statement

Name

Date

ASSETS (Everything you OWN) Continued

Cash and Cash Equivalents

Cash on Hand\$Checking Account(s)\$Savings Account(s)\$Money Market Accounts\$CD's\$Cash Value of Life Insurance\$Other\$Total Cash/Cash Equivalents\$

TOTAL ASSETS

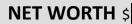
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LIABILITIES (Everything you OWE)

- Debt
- Mortgage Home Loan or HELOC Car Loan(s) Student Loans Credit Card Loans Life Insurance Policy Loan Other property Ioans I.O.U.s Businesses Other

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Total Liabilities \$



All Assets minus All Liabilities

