

***Personal Net Worth Statement*****ASSETS**

Checking account \$ \_\_\_\_\_

Savings account \$ \_\_\_\_\_

Cash on hand \$ \_\_\_\_\_

Life insurance policy

cash surrender/loan value \$ \_\_\_\_\_

Total cash/cash equivalent holdings \$ \_\_\_\_\_

*Real and Personal Property*

Property #1 \$ \_\_\_\_\_

Property #2 \$ \_\_\_\_\_

Property #3 \$ \_\_\_\_\_

Automobile #1 \$ \_\_\_\_\_

Automobile #2 \$ \_\_\_\_\_

Automobile #3 \$ \_\_\_\_\_

Personal property \$ \_\_\_\_\_

Personal property \$ \_\_\_\_\_

Personal property \$ \_\_\_\_\_

Total real and personal property \$ \_\_\_\_\_

*Retirement, Pension, and Investment Plans*

Stocks \$ \_\_\_\_\_

IRAs \$ \_\_\_\_\_

401(k) plans \$ \_\_\_\_\_

Certificates of deposit \$ \_\_\_\_\_

Mutual funds \$ \_\_\_\_\_

Total retirement, pension, and

investment plans \$ \_\_\_\_\_

Total assets \$ \_\_\_\_\_

**LIABILITIES***Home Debt*

Home loan \$ \_\_\_\_\_

Second lien \$ \_\_\_\_\_

Home-improvement loan \$ \_\_\_\_\_

Total home debt \$ \_\_\_\_\_

Automobile loan \$ \_\_\_\_\_

Student loan \$ \_\_\_\_\_

Credit card debt \$ \_\_\_\_\_

Personal loan \$ \_\_\_\_\_

Any other debt \$ \_\_\_\_\_

Total liabilities \$ \_\_\_\_\_

## Bottom line

(subtract liabilities from assets) \$ \_\_\_\_\_