



## Net Worth Statement

Name: \_\_\_\_\_

Date: \_\_\_\_\_

### ASSETS

#### CASH ASSETS

Cash on hand: \_\_\_\_\_

Checking accounts: \_\_\_\_\_

Savings accounts: \_\_\_\_\_

CD's: \_\_\_\_\_

#### HARD ASSETS

Home Value: \_\_\_\_\_

Other Real Estate: \_\_\_\_\_

Vehicles: \_\_\_\_\_

Collectibles: \_\_\_\_\_

Personal Possessions: \_\_\_\_\_

Other: \_\_\_\_\_

#### INVESTMENTS

Non-Retirement: \_\_\_\_\_

College Savings: \_\_\_\_\_

IRA/Roth IRA's: \_\_\_\_\_

401k, 401a, 403b, etc: \_\_\_\_\_

Life Ins. Cash Value: \_\_\_\_\_

Other: \_\_\_\_\_

**TOTAL ASSETS:** \_\_\_\_\_

### LIABILITIES

#### SHORT TERM LIABILITIES

Credit Card: \_\_\_\_\_

Automobile(s): \_\_\_\_\_

Personal: \_\_\_\_\_

Life Ins. Loan: \_\_\_\_\_

Unpaid Taxes: \_\_\_\_\_

401(k) Loan: \_\_\_\_\_

#### LONG TERM LIABILITIES

Student Loans: \_\_\_\_\_

Mortgage(s): \_\_\_\_\_

HELOC: \_\_\_\_\_

Other loans: \_\_\_\_\_

**TOTAL LIABILITIES:** \_\_\_\_\_

**TOTAL NET WORTH:** \_\_\_\_\_

*(Total Assets minus total Liabilities)*



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