



Net Worth Worksheet

An admirable financial goal is to increase your net worth. You can do this by increasing the values in the asset column or by decreasing the values in the liability column. The preparation of a net worth statement will provide you with a realistic picture of your current financial situation. Update your Net Worth Statement every year to determine if you are on track.

<i>What You Own</i>	<i>Versus</i>
Assets: <i>(what you own)</i>	Current Value
Checking Accounts	_____
Saving Accounts	_____
Money Market Accounts	_____
Cash Value: Life Insurance	_____
Cash Value: Other Liquid Assets	_____

A **Total Liquid Assets:**

Mutual Funds	_____
Stocks	_____
Bonds	_____
CDs	_____
Investment Real Estate	_____
IRA	_____
401(k)	_____
Pension	_____
Other Investments	_____

B **Total Investment Assets:**

Residence	_____
Vacation Home	_____
Home Furnishings	_____
Automobiles	_____
Jewelry/Art	_____
Other Personal Assets	_____

C **Total Personal Assets**

<i>What You Owe</i>	
Liabilities: <i>(what you owe)</i>	Current Value
Credit Card Balances	_____
Bank Overdrafts	_____
Car Loans	_____
Personal Loans	_____
Educational Loans	_____
Home Mortgage	_____
Other Loans	_____

D **Total Liabilities:**

A + B + C _____
Total Assets

- D _____
Total Liabilities

= Net Worth _____