



Net Worth Worksheet

Step #1 - Gather important financial statements, enter the information below.

Step #2 - Review your total assets compared to your liabilities.

Step #3 - Create goals to increase your assets and reduce your liabilities.

ASSETS - The market value of what you own

Primary residence	
Other real estate	
Vehicles (autos, boats, etc.)	
Cash (including checking)	
Savings accounts	
Money Market accounts	
Certificates of deposit	
Stocks/Bonds	
IRAs	
401(k) plans or other retirement	
Cash value life insurance	
Personal property	
Collectibles	
Jewelry	
Other (1)	
Other (2)	
Other (3)	
Other (4)	
TOTAL ASSETS	

LIABILITIES - The total amount you owe

Primary residence	
Other real estate	
Home equity loan	
Vehicles (autos, boats, etc.)	
Credit cards	
Student loans	
Personal loans	
Taxes due	
Judgments & liens	
Other (1)	
Other (2)	
Other (3)	
Other (4)	
TOTAL LIABILITIES	

Total Assets	
Total Liabilities	
NET WORTH	