

# Personal Net Worth Worksheet

ASSETS	CURRENT VALUE
<b>Cash and Cash Equivalents</b>	
Checking accounts	\$ <input type="text"/>
Savings accounts	\$ <input type="text"/>
Money market accounts	\$ <input type="text"/>
Savings bonds	\$ <input type="text"/>
CD's	\$ <input type="text"/>
Cash value insurance	\$ <input type="text"/>
<b>Total Cash</b> \$	
<b>Invested Assets</b>	
<b>Taxable accounts</b>	
Brokerage	\$ <input type="text"/>
Other: _____	\$ <input type="text"/>
<b>Retirement</b>	
IRA	\$ <input type="text"/>
Roth IRA	\$ <input type="text"/>
401(k) or 403(b)	\$ <input type="text"/>
SEP-IRA	\$ <input type="text"/>
Keogh or other qualified plan	\$ <input type="text"/>
Pension (vested benefit)	\$ <input type="text"/>
Annuity (accumulated value)	\$ <input type="text"/>
<b>Business ownership Interests</b>	
Real estate (rental property or land)	\$ <input type="text"/>
Sole proprietorship	\$ <input type="text"/>
Partnership	\$ <input type="text"/>
C Corporation	\$ <input type="text"/>
S Corporation	\$ <input type="text"/>
Limited liability company	\$ <input type="text"/>
Other: _____	\$ <input type="text"/>
<b>Total Invested Assets</b> \$	

ASSETS (Continued)	CURRENT VALUE
<b>Use Assets</b>	
Principal home	\$ <input type="text"/>
Real Property	\$ <input type="text"/>
Cars, trucks, boats	\$ <input type="text"/>
Home furnishings	\$ <input type="text"/>
Art, antiques, collectibles	\$ <input type="text"/>
Jewelry, furs	\$ <input type="text"/>
Other: _____	\$ <input type="text"/>
<b>Total Use Assets</b> \$ _____	
<b>Total Assets</b> \$ _____	

LIABILITIES	CURRENT AMOUNT DUE
<b>Current</b>	
Credit card balances	\$ <input type="text"/>
Estimated income tax owed	\$ <input type="text"/>
Other outstanding bills	\$ <input type="text"/>
<b>Long-Term</b>	
Home mortgage	\$ <input type="text"/>
Home equity loan	\$ <input type="text"/>
Mortgages on rental properties	\$ <input type="text"/>
Car loans	\$ <input type="text"/>
Student loans	\$ <input type="text"/>
Life insurance policy loans	\$ <input type="text"/>
Other long-term debt	\$ <input type="text"/>
<b>Total Liabilities</b> \$ _____	
<b>NET WORTH</b> \$ _____	
Total assets minus total liabilities	