

NAME(S) \_\_\_\_\_ DATE \_\_\_\_\_

NET WORTH STATEMENT

ASSETS Market Value

LIQUID

Cash \_\_\_\_\_  
 Checking \_\_\_\_\_  
 Savings \_\_\_\_\_  
 Certificate of Dep. \_\_\_\_\_  
 Money Market Funds \_\_\_\_\_  
 Other \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

SUB-TOTAL \_\_\_\_\_

TANGIBLE

Home \_\_\_\_\_  
 Auto \_\_\_\_\_  
 Auto \_\_\_\_\_  
 Personal Property \_\_\_\_\_  
 Other \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

SUB-TOTAL \_\_\_\_\_

INVESTMENT

Stocks \_\_\_\_\_  
 Bonds \_\_\_\_\_  
 Mutual Funds \_\_\_\_\_  
 Retirement Funds \_\_\_\_\_  
 Real Estate \_\_\_\_\_  
 Other \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

SUB-TOTAL \_\_\_\_\_

TOTAL ASSETS \_\_\_\_\_

LIABILITIES Amount

SHORT-TERM

Credit Card \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 Other \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

SUB-TOTAL \_\_\_\_\_

LONG-TERM

Home \_\_\_\_\_  
 Auto \_\_\_\_\_  
 Auto \_\_\_\_\_  
 Student Loan \_\_\_\_\_  
 Home Equity \_\_\_\_\_  
 Other \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

SUB-TOTAL \_\_\_\_\_

TOTAL LIABILITIES \_\_\_\_\_

<b>Total Assets</b>	\$ _____
<b>Total Liabilities</b>	- \$ _____
<b>NET WORTH</b>	= \$ _____