

PERSONAL NET WORTH WORKSHEET

■ Total Assets \$ _____

■ Total Debts \$ _____

■ Net Worth \$ _____

NOTES

ASSETS

CATEGORY	ITEM	VALUE
Real Estate	Home	\$ _____
Real Estate	Other	\$ _____
Investments	Retirement accounts	\$ _____
Investments	Stocks	\$ _____
Investments	Bonds	\$ _____
Investments	Mutual funds	\$ _____
Investments	CDs	\$ _____
Investments	Bullion	\$ _____
Investments	Trust funds	\$ _____
Investments	Health savings account	\$ _____
Investments	Face value of life insurance policy	\$ _____
Investments	Other	\$ _____
Cash	Checking accounts	\$ _____
Cash	Savings accounts	\$ _____
Cash	Other	\$ _____
Personal Property	Cars	\$ _____
Personal Property	Other vehicles	\$ _____
Personal Property	Furnishings	\$ _____
Personal Property	Collectibles	\$ _____
Personal Property	Jewelry	\$ _____
Personal Property	Other luxury goods	\$ _____
TOTAL ASSETS		\$ _____

DEBTS

CATEGORY	VALUE
Mortgages	\$ _____
Home equity loans	\$ _____
Car loans	\$ _____
Personal loans	\$ _____
Credit cards	\$ _____
Student loans	\$ _____
Loans against investments	\$ _____
Life insurance loans	\$ _____
Other installment loans	\$ _____
Other debts	\$ _____
TOTAL DEBTS	\$ _____