

Net-Worth Statement

Enter your names at the top of the columns and record the date. Fill in all fields. To find your net worth, subtract your total liabilities (debts) from your total assets.

Date: _____

Assets (what you have)

Cash on hand	\$		\$
Checking/share draft account			
Savings accounts			
Certificates of deposit (CDs)			
Money market funds and accounts			
Savings bonds			
Stocks			
Mutual funds			
Individual retirement accounts (IRAs)			
401(k) or 403(b) accounts or Keogh plan			
Pension (vested interest)			
Tax-deferred annuities			
Real estate (home, condo, investments)			
Cash value of whole life insurance			
Book value of automobiles			
Furnishings and other personal property			
Jewelry and collectibles			
Other assets			
Total Assets	\$		\$

Liabilities (what you owe)

Credit and charge-card debt	\$		\$
Automobile loans			
Student loans			
Home equity loans			
Loans from family or friends			
Business loans			
Mortgage			
Other loans			
Taxes owed			
Alimony/child support			
Other debts			
Total Liabilities	\$		\$

Net Worth = Assets - Liabilities: \$ _____ \$ _____