



MONEY CAN'T BUY HAPPINESS

"You don't live on your net worth. It is in fact just a number on paper. You actually live off your income, even as your net worth fluctuates."

Identify Your Investable Net Worth

(These are assets that generate income for your retirement)

TOTAL INVESTABLE ASSETS	
Checking, savings and money markets	
Retirement Accounts	
Investment/brokerage accounts	
Other	
TOTAL	

TOTAL LIABILITIES	
Mortgage	
Care loans	
Other	
TOTAL	

Total Investment Assets – Total Liabilities = Investable Net Worth

_____ - _____ = _____

NET WORTH MANIFESTO

You are bigger than your numbers! Your net worth statement can include more...

Why is your net worth important to you?: _____

Who You Are: _____

Net worth is only a number; It does not define you. Use words to describe and define yourself. _____

What You Do: _____

What are the actions and activities that make up who you are? _____

Who You Do It For: _____

Who are the most important people in your life? To who do you want to be a hero? _____

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