



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?: _____

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

What are the actions and activities that bring you joy and give you purpose? _____

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

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