

Personal Net Worth Statement

Personal Information

Name _____

Email _____

Home Phone _____ Cell Phone _____

Assets

Checking Accounts \$ _____

Savings Accounts \$ _____

Retirement Funds \$ _____

Investment Accounts \$ _____

College Programs \$ _____

Real Estate Holdings \$ _____

Automobiles \$ _____

Other Personal Property \$ _____

Other Assets \$ _____

Total Assets \$ _____

Liabilities

Credit Card Balance \$ _____

Auto and Other Loans \$ _____

Installment Accounts \$ _____

Mortgage Balances \$ _____

Loans Against Life Insurance \$ _____

Other Liabilities \$ _____

Total Liabilities \$ _____

Net Worth

Total Assets \$ _____

Less Total Liabilities -\$ _____

Net Worth \$ _____