



Name(s) _____

Date _____

Net Worth Worksheet

Fill in all applicable items:

	Current Balance / Fair Market Value (What it is worth today?)	Liabilities	Current Outstandi ng Balance
Assets through NFG*	\$ _____		
Assets outside NFG*			
Checking & savings accounts	\$ _____	Primary residence (mortgage loan, second mortgage, &/or personal note)	\$ _____
CDs & Money Markets	_____	Home equity loan or line of credit	_____
Cash Value of Life Insurance policies	_____	Other real estate loans	_____
Individual stocks and bonds	_____	Life insurance loans	_____
Pension/Profit Sharing Plans	_____	School loans	_____
401(k), 403(b), etc.	_____	Vehicle loans	_____
IRA accounts	_____	Credit card balances	_____
Other non-retirement accounts	_____	Total installment balances	_____
Other retirement accounts	_____	Retirement plan loans	_____
Employee stock options	_____	Taxes past due	_____
Primary residence (total appraised value, not just equity)	_____	Co-signer on other loans	_____
Rental Property value	_____	Other amounts due (list:)	_____
Other investment real estate	_____	_____	_____
Other investment assets (list)	_____	_____	_____
_____	_____	_____	_____
TOTAL ASSETS	\$ _____ 0	TOTAL LIABILITIES	\$ _____
		TOTAL ASSETS	\$ _____ 0
Life Insurance Death Benefits	\$ _____	TOTAL LIABILITIES	\$ _____
	minus	NET WORTH	\$ _____ 0
	equals		
		Liquid Net Worth	\$ _____ 0
		Net Worth less residence	\$ _____ 0
Total annual income from all sources	\$ _____		
JT or Individual?	_____	Signature	_____
		Co-Owner Signature	_____

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