

Calculating Your Net Worth

ASSETS – What you own		LIABILITIES – What you Owe	
Cash	Amount	Debt	Amount
Checking Accounts		Credit Card 1	
Savings Accounts		Credit Card 2	
Money Markets		Credit Card 3	
CDs/ Savings Bonds		Other Cards	
		Other Liabilities	
Total		Total	
Real Estate/Property	Amount	Mortgages	Amount
Primary Residence		Primary/ Secondary Residence	
Second Home		Land	
Rental Property		Rental Property	
Land		Other	
Vehicles			
RV/Boat/Motorcycle			
Jewelry/Art/Collectibles			
Other			
Total		Total	
Investments	Amount	Loans	Amount
Stocks & Bonds		Home Equity Loans	
Mutual Funds		Business Loans	
Annuities		Vehicle Loans	
Traditional IRA		RV/Boat/Motorcycle Loans	
Roth IRA		Education Loans	
401k/403b/457 Plan		Life Insurance Loans	
Pension Plans		Personal Loans	
Stock Options		Other Loans	
Loans Receivable			
Life Insurance			
Private Company Stock			
Total		Total	
TOTAL ASSETS		TOTAL LIABILITIES	
Total assets: _____ - Total liabilities: _____ = _____ Personal Net Worth			