

Net Worth Worksheet Date: _____

CASH	Amount
Cash on Hand	
Checking Accounts	
Savings Accounts	
Money Market Accounts	
Certificates of Deposit	
Other Accounts	
TOTAL CASH	

PERSONAL PROPERTY	Value
Vehicles	
Boat/RV/etc.	
Collectibles/Antiques	
Jewelry	
Appliances	
Home Furnishings	
TOTAL PERSONAL PROPERTY	

REAL ESTATE	Value
Principal Residence	
Other Residence(s)	
Land	
Investment Properties	
Any Other Real Estate	
TOTAL REAL ESTATE	

INVESTMENTS	Value
Mutual Funds	
Brokerage Accounts	
Cash Value Life Insurance	
Savings Bonds	
Other Investments	
TOTAL INVESTMENTS	

RETIREMENT	Value
Thrift Savings Plan or 401(k) or 403(b)	
Individual Retirement Arrangements	
Other Pensions/Annuities	
TOTAL RETIREMENT	

TOTAL CASH	
TOTAL REAL ESTATE	
TOTAL RETIREMENT	
TOTAL PERSONAL PROPERTY	
TOTAL INVESTMENTS	
TOTAL ASSETS	

Net Worth Worksheet Date: _____

OUTSTANDING DEBTS	Amount
Household Bills	
Medical Bills	
Back Taxes	
Legal Bills	
Child Support/Alimony	
Personal Debts	
Debts to Government	
TOTAL OUTSTANDING DEBTS	

LOANS	Balance
Home Equity Loans	
Car Loan #1	
Car Loan #2	
Student Loans	
Personal Bank Loans	
Finance Company Loans	
Personal Loans, from family or friends	
Loans against retirement accounts	
Any Other Loans	
TOTAL LOANS	

CREDIT CARDS	Balance
Credit Card #1	
Credit Card #2	
Credit Card #3	
Credit Card #4	
Credit card #5	
Other Credit Cards* list on back	
TOTAL CREDIT CARDS	

TOTAL OUTSTANDING DEBTS	
TOTAL CREDIT CARDS	
TOTAL MORTGAGES	
TOTAL LOANS	
TOTAL LIABILITIES	

MORTGAGES	Balance
Primary Residence	
Other Mortgage	
Other Mortgage	
TOTAL MORTGAGES	

TOTAL ASSETS	
TOTAL LIABILITIES	
NET WORTH	