



Family Net Worth Statement Worksheet

Assets – What you own

Cash	
Cash	
Checking account	
Savings account	
Certificates of Deposit	
Cash value of life insurance	
Total Cash	

Investments	
Stocks	
Bonds	
Mutual funds	
Treasury bills	
Total Investments	

Property	
Primary residence (market value)	
Vehicle (current blue book value)	
Jewelry	
Art	
Collectibles	
Total Property	

Retirement Accounts	
IRA	
401k	
403b	
Total Retirement Accounts	

Accounts Receivable (Any outstanding income you expect to receive)	
Total Accounts Receivable	

Total Assets	
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Liabilities – What you owe

Real Estate	
Primary mortgage	
Second mortgage	
Home equity loan	
Total Real Estate	

Installment Loans	
Vehicle	
Vehicle	
RV	
Boat	
Furnishings	
Appliances	
Total Installment Loans	

Personal Loans	
Student loans	
Medical	
Total Personal Loans	

Charge Accounts	
Total Charge Accounts	

Unpaid Bills	
Taxes	
Insurance	
Rent	
Utilities	
Total Unpaid Bills	

Total Liabilities	
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Total Assets _____ — **Total Liabilities** _____ = **Net Worth** _____

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