



Net Worth Worksheet

Assets

Savings accounts	\$
Checking accounts	\$
Mutual funds	\$
Certificates of deposit	\$
U. S. Savings Bonds	\$
Life insurance (cash value)	\$
Annuities (cash value)	\$
IRA account	\$
Pension (vested interest)	\$
Company savings plan(s)	\$
Securities (market value)	\$
Real estate (market value)	\$
Home (equity)	\$
Business interest	\$
Personal property	\$
Other	\$
Total Assets	

Liabilities

Mortgage (balance due)	\$
Taxes (due and unpaid)	\$
Installment loans (balance due, auto or home improvement)	\$
Charge accounts (balance due)	\$
Charitable pledges	\$
Other	\$
Total Liabilities	\$

Total assets	\$
Total liabilities	\$ -
Net Worth	\$