

Name(s) _____ Date _____

NET WORTH STATEMENT

| ASSETS | Market Value | LIABILITIES | Amount |
|--------------------------|---|--------------------------|--|
| <u>LIQUID</u> | | <u>SHORT-TERM</u> | |
| Cash | <input style="width: 80px;" type="text"/> | Credit Card _____ | <input style="width: 80px;" type="text"/> |
| Checking | <input style="width: 80px;" type="text"/> | _____ | <input style="width: 80px;" type="text"/> |
| Savings | <input style="width: 80px;" type="text"/> | Taxes | <input style="width: 80px;" type="text"/> |
| Certificate of Dep. | <input style="width: 80px;" type="text"/> | Utilities | <input style="width: 80px;" type="text"/> |
| Money Market Funds | <input style="width: 80px;" type="text"/> | Medical | <input style="width: 80px;" type="text"/> |
| Other _____ | <input style="width: 80px;" type="text"/> | _____ | <input style="width: 80px;" type="text"/> |
| _____ | <input style="width: 80px;" type="text"/> | Other _____ | <input style="width: 80px;" type="text"/> |
| SUB-TOTAL | <input style="width: 80px;" type="text"/> | _____ | <input style="width: 80px;" type="text"/> |
| <u>TANGIBLE</u> | | <u>SUB-TOTAL</u> | |
| Home | <input style="width: 80px;" type="text"/> | <u>LONG-TERM</u> | |
| Auto | <input style="width: 80px;" type="text"/> | Home | <input style="width: 80px;" type="text"/> |
| Personal Property | <input style="width: 80px;" type="text"/> | Auto _____ | <input style="width: 80px;" type="text"/> |
| Other _____ | <input style="width: 80px;" type="text"/> | Auto _____ | <input style="width: 80px;" type="text"/> |
| _____ | <input style="width: 80px;" type="text"/> | Real Estate | <input style="width: 80px;" type="text"/> |
| SUB-TOTAL | <input style="width: 80px;" type="text"/> | Student Loan | <input style="width: 80px;" type="text"/> |
| <u>INVESTMENT</u> | | Home Equity | <input style="width: 80px;" type="text"/> |
| Stocks & Bonds | <input style="width: 80px;" type="text"/> | Other _____ | <input style="width: 80px;" type="text"/> |
| Mutual Funds | <input style="width: 80px;" type="text"/> | _____ | <input style="width: 80px;" type="text"/> |
| Retirement Funds | <input style="width: 80px;" type="text"/> | SUB-TOTAL | <input style="width: 80px;" type="text"/> |
| Real Estate | <input style="width: 80px;" type="text"/> | | |
| Other _____ | <input style="width: 80px;" type="text"/> | | |
| _____ | <input style="width: 80px;" type="text"/> | | |
| SUB-TOTAL | <input style="width: 80px;" type="text"/> | Net Worth \$ | <input style="width: 100px;" type="text"/> |