

Family Net Worth Summary

Family Information

Family Name	Smith
Date	June 15, 2024
Prepared by	Jane Smith

Assets

Asset Category	Description	Value (USD)
Cash & Savings	Bank Accounts	25,000
Investments	Stocks & Mutual Funds	60,000
Real Estate	Primary Residence	320,000
Vehicles	SUV & Sedan	30,000
Personal Property	Jewelry & Furniture	7,500
Total Assets		442,500

Liabilities

Liability Category	Description	Amount Owed (USD)
Mortgage	Home Mortgage	195,000
Auto Loan	SUV Loan	12,000
Credit Cards	Visa, Mastercard	3,800
Other Loans	Student Loan	9,000
Total Liabilities		219,800

Net Worth Calculation

Item	Amount (USD)
Total Assets	442,500
Total Liabilities	219,800
Net Worth (Assets - Liabilities)	222,700

Important Notes:

- All values are estimates; update regularly for accuracy.
- Include all family assets and outstanding debts for completeness.
- Net worth reflects the family's overall financial position at a point in time.
- This summary is for personal use and may not satisfy banks or official institutions.
- Seek professional financial advice for complex assets or liabilities.

