

# Net Worth Statement

Applicant Name:

[Enter Name]

Date:

[MM/DD/YYYY]

## Assets

| Asset Description                         | Current Value  |
|---|----------------|
| Cash (Checking & Savings Accounts)        | [Amount]       |
| Investments (Stocks, Bonds, Mutual Funds) | [Amount]       |
| Retirement Accounts (401k, IRA)           | [Amount]       |
| Real Estate (Market Value of Home)        | [Amount]       |
| Vehicles (Cars, Boats, etc.)              | [Amount]       |
| Other Assets (Jewelry, Art, etc.)         | [Amount]       |
| Total Assets                              | [Total Assets] |

## Liabilities

| Liability Description | Current Balance     |
|-----------------------|---------------------|
| Mortgage Balance      | [Amount]            |
| Car Loans             | [Amount]            |
| Credit Card Debt      | [Amount]            |
| Student Loans         | [Amount]            |
| Other Liabilities     | [Amount]            |
| Total Liabilities     | [Total Liabilities] |

## Net Worth Calculation

Total Assets

[Total Assets]

Less: Total Liabilities

[Total Liabilities]

Net Worth

[Net Worth]

## Important Notes

- Ensure all amounts are accurate and up-to-date as of the statement date.
- Include supporting documents for significant assets and liabilities when submitting.
- Net worth statements are used to assess your overall financial health for loan approval.
- Providing false or misleading information may lead to loan denial or legal consequences.
- If assets are jointly held, indicate ownership share appropriately.