

Net Worth Statement

Date: _____

Name: _____

Assets

Asset	Value
Cash & Savings	\$ _____
Investments (Stocks, Bonds, Mutual Funds)	\$ _____
Retirement Accounts (401k, IRA, etc.)	\$ _____
Primary Residence (Market Value)	\$ _____
Other Real Estate	\$ _____
Vehicles	\$ _____
Personal Property (Jewelry, Art, etc.)	\$ _____
Other Assets	\$ _____
Total Assets	\$ _____

Liabilities

Liability	Amount Owed
Mortgage	\$ _____
Home Equity Loans	\$ _____
Auto Loans	\$ _____
Credit Card Balances	\$ _____
Student Loans	\$ _____
Personal Loans	\$ _____
Other Liabilities	\$ _____
Total Liabilities	\$ _____

Net Worth Calculation

Total Assets	\$ _____
Minus: Total Liabilities	\$ _____
Net Worth	\$ _____

Important Notes

- This document provides a snapshot of your current financial position.
- Asset values should reflect current fair market value.
- Be as accurate and comprehensive as possible for both assets and liabilities.
- Regular updates help track progress toward financial goals.

- Consult with a financial advisor for interpretation and planning advice.