

name: _____

date: _____



Do you know your net worth?



directions

Now it is time to figure out your Net Worth.

The simple equation is: $ASSETS - LIABILITIES = NET\ WORTH$

Start by adding up all of your assets:

assets

Cash and Equivalents

Checking Account Balance	\$
Savings Account Balance	\$
Credit Union Account	\$
Money Market or other Acct.	\$
Life Insurance Cash Value	\$

Investments

Certificates of Deposit	\$
Stocks	\$
Mutual Funds	\$
IRA	\$
Keogh	\$
Pension	\$
Other	\$

Business Interests & Partnerships

Business Interests	\$
Partnership Interests	\$
Loans Outstanding	\$

Real Estate

Personal Residence	\$
Second Home	\$
Rental Properties	\$

name: _____

date: _____



Do you know your net worth? (continued)

assets cont

Personal Assets

Cars	\$
Collectibles	\$
Art	\$
Gold and Silver	\$
Jewelry	\$
Antiques	\$
Coins & Stamps	\$
Furnishings	\$
Camper	\$
Boats	\$
Other	\$
Other	\$
Other	\$
total assets	\$

Now add up all of your liabilities:

liabilities

Real Estate

Home Mortgage	\$
Home Equity Loan	\$
Other Real Estate Loans	\$

name: _____

date: _____



Do you know your net worth? (continued)

liabilities cont

Business and Partnership

Business Loan	\$
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Partnership Loan	\$
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Other	\$
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Taxes Owed

Income Taxes Owed	\$
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Property Taxes Owed	\$
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Other Taxes Owed	\$
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Personal

Car Loans	\$
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Alimony Owed	\$
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Child Support Owed	\$
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Credit Lines	\$
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Life Insurance Loans	\$
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Student/Tuition Loan	\$
----------------------	----

Personal Loan	\$
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Charge Accounts	\$
-----------------	----

Credit Card Debt	\$
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Insurance Payments Owed	\$
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Other	\$
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total liabilities	\$
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Subtract your total liabilities from your total assets to figure your net worth.

Total Assets _____ - Total Liabilities _____ = Net Worth _____