

Personal Net Worth Statement

As of [Date]:

1. Personal Information

Name: _____

Address: _____

Phone Number: _____

Email: _____

2. Assets

A. Liquid Assets

Cash and Bank Accounts:

Checking Accounts: \$ _____

Savings Accounts: \$ _____

Money Market Accounts: \$ _____

Investments:

Stocks: \$ _____

Bonds: \$ _____

Mutual Funds: \$ _____

Retirement Accounts (401(k), IRA, etc.): \$ _____

Other Liquid Assets:

Certificates of Deposit: \$ _____

Other: \$ _____

Total Liquid Assets: \$ _____

B. Personal Property

Real Estate:

Primary Residence: \$ _____

Other Real Estate: \$ _____

Vehicles:

Cars: \$ _____

Other Vehicles: \$ _____

Other Personal Property:

Jewelry: \$ _____

Collectibles: \$ _____

Furniture: \$ _____

Total Personal Property: \$ _____

C. Other Assets

Business Interests: \$ _____

Life Insurance (cash value): \$ _____

Other: \$ _____
Total Other Assets: \$ _____

Total Assets (A + B + C): \$ _____

3. Liabilities

A. Short-Term Liabilities

Credit Card Debt: \$ _____
Personal Loans: \$ _____
Other Short-Term Debt: \$ _____

Total Short-Term Liabilities: \$ _____

B. Long-Term Liabilities

Mortgages:
 Primary Residence Mortgage: \$ _____
 Other Real Estate Mortgages: \$ _____
Student Loans: \$ _____
Car Loans: \$ _____
Other Long-Term Debt: \$ _____

Total Long-Term Liabilities: \$ _____

Total Liabilities (A + B): \$ _____

4. Net Worth Calculation

Total Assets: \$ _____
Total Liabilities: \$ _____
Net Worth (Total Assets - Total Liabilities): \$ _____