

# My Personal Net Worth Worksheet



Cash on hand	\$
Cash—share draft/checking	
Cash—share savings	
Money market funds	
Share certificates/CDs	
U.S. savings bonds	
Bonds (individually owned)	
Bond mutual funds	
Pension plans, vested equity	
401(k) or 403(b) plans	
Individual retirement accounts	
Profit sharing, vested equity	
Keogh plans	
Annuities, surrender value	
Stocks (individually owned)	
Stock mutual funds	
Real estate investment funds	
Precious metals	
Home equity	
Market value, other real estate	
Other investments	
Life insurance, cash value	
Blue book value of vehicles	
Blue book value of boats, RVs	
Household furnishings	
Collectibles	
Furs, jewelry	
Loans owed to you	
Other assets	
<b>Total Assets</b>	<b>\$</b>

Mortgage balance(s)	\$
Vehicle loans	
Home equity loans	
Student loans	
Business loans	
Alimony	
Child support	
Other personal loans	
Credit and charge card debt	
Other credit lines	
Medical debt	
Insurance due	
Taxes owed	
Other bills	
<b>Total Liabilities</b>	<b>\$</b>
<b>Assets - Liabilities =</b>	
<b>Net Worth:</b>	
	<b>\$</b>