



## Assets (what you own)

|                     |    |
|---------------------|----|
| Checking account(s) | \$ |
| Saving account(s)   | \$ |
| CDs                 | \$ |
| Money market funds  | \$ |

|         |    |
|---------|----|
| 401(k)  | \$ |
| 403(b)  | \$ |
| IRA(s)  | \$ |
| Pension | \$ |

|                                      |    |
|--------------------------------------|----|
| Automobile value                     | \$ |
| Principal home (market value)        | \$ |
| Additional properties (market value) | \$ |

|  |    |
|--|----|
|  | \$ |
|  | \$ |
|  | \$ |
|  | \$ |
|  | \$ |

|  |    |
|--|----|
|  | \$ |
|  | \$ |
|  | \$ |
|  | \$ |
|  | \$ |

|  |    |
|--|----|
|  | \$ |
|  | \$ |
|  | \$ |
|  | \$ |
|  | \$ |

|  |    |
|--|----|
|  | \$ |
|  | \$ |
|  | \$ |
|  | \$ |
|  | \$ |

|                   |    |
|-------------------|----|
| Business          | \$ |
| Partnership       | \$ |
| Other investments | \$ |

|                                       |    |
|---------------------------------------|----|
| Cash value of life insurance policies | \$ |
| Money owed to you                     | \$ |
| Other investable assets               | \$ |

[illegible]

|                     |           |
|---------------------|-----------|
| <b>Total assets</b> | <b>\$</b> |
|---------------------|-----------|

## Liabilities (what you owe)

### Real estate loans (outstanding balance)

|                                 |    |
|---------------------------------|----|
| Principal home mortgage(s)      | \$ |
| Additional property mortgage(s) | \$ |
| Home equity loans               | \$ |

### Other loan types (outstanding balance)

|                                  |    |
|----------------------------------|----|
| Automobile                       | \$ |
| College                          | \$ |
| Personal                         | \$ |
| Loans against 401(k)s            | \$ |
| Loans against insurance policies | \$ |

### Balance on unpaid bills (e.g., credit card debt)

| Company | Interest rate | Balance |
|---------|---------------|---------|
|         |               | \$      |
|         |               | \$      |
|         |               | \$      |
|         |               | \$      |
|         |               | \$      |

### Unpaid tax bills (income and property)

|         |    |
|---------|----|
| Federal | \$ |
| State   | \$ |
| Local   | \$ |

### Other liabilities

|  |    |
|--|----|
|  | \$ |
|  | \$ |
|  | \$ |
|  | \$ |
|  | \$ |
|  | \$ |
|  | \$ |
|  | \$ |
|  | \$ |

**Total liabilities** **\$**

**Total assets - Total liabilities = Current net worth:** **\$**

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