

# Personal Net Worth Statement

If you are married, be sure to include your spouse's assets and liabilities in your totals.

<b>Assets</b>		
<i>Cash &amp; Equivalents</i>		
	Long-term savings account	\$
	CD's	\$
	Money Market account	\$
	Cash value of life insurance	\$
	Other	\$
<b>A. Total Cash &amp; Equivalents</b>		<b>\$</b>

<i>Invested Assets</i>		
	IRAs (Roth & Traditional)	\$
	Retirement accounts (401k, 403b, etc.)	\$
	Brokerage & taxable accounts	\$
	Business interests	\$
	Rental properties	\$
<b>B. Total Invested Assets</b>		<b>\$</b>

<i>Use (Hard) Assets</i>		
	Residence	\$
	Automobiles	\$
	Other vehicles (boats, RVs, etc.)	\$
	Personal belongings	\$
	Collectibles	\$
	Other	\$
<b>C. Total Use (Hard) Assets</b>		<b>\$</b>

<b>D. Total Liquid Assets (A + B)</b>		\$
<b>E. TOTAL ASSETS (C + D)</b>		\$

<b>Liabilities</b>		
<i>Short-Term Debt</i>		
	Credit cards	\$
	Unpaid bills (like medical bills)	\$
	Other	\$
<b>F. Total Short-Term Debt</b>		\$

<i>Long-Term Debt</i>		
	Student loans	\$
	Mortgage	\$
	Secondary mortgage or line of credit	\$
	Auto loans	\$
	Personal loans	\$
	Other	\$
<b>G. Total Long-Term Debt</b>		\$
<b>H. TOTAL LIABILITIES (F + G)</b>		\$

<b>Net Worth</b>		
<b>I. NET WORTH (E - H)</b>		\$
<b>J. Liquid Net Worth (D - H)</b>		\$