

Net Worth Worksheet

To calculate your net worth, list the fair market value of your assets.

List the outstanding balance on your debts.

Total assets.

Total liabilities.

Subtract liabilities from assets to get net worth.

Assets

Liquid Assets

Whole life insurance cash value _____
Cash on hand and in bank _____
Checking accounts _____
Savings accounts _____
Money market accounts _____
Certificates of deposit _____
Savings bonds _____

Investments

Stocks _____
Corporate bonds _____
Government/municipal bonds _____
Mutual funds _____
Retirement plans _____

Other

Real Property _____
Personal Property _____

Total Assets

Debts

Mortgage _____
Car loan _____
Installment debts _____
Personal loans _____
Life insurance loans _____
Charge accounts _____
Credit cards _____
Taxes _____
Other _____

Total Debts

Total Assets

Total Debts

Net

Face value _____
Whole life insurance _____
Term life insurance _____
Total face value of insurance _____

