

NET WORTH STATEMENT

Assets (What you own)

Cash on hand and in banks
Savings accounts
IRA / other retirement accounts
Accounts & notes receivable
Life insurance—cash value only
Stocks and bonds
Real estate
Auto—present value
Other personal property
Other assets

Total Assets: _____

Liabilities (What you owe)

Short Term:
Charge accounts, credit cards, overdraft
Loans to banks and others
Taxes (owing income or property)
Other (family obligations, etc.)

Long Term:
Loans on life insurance
Mortgage on real estate
Other liabilities

Total Liabilities: _____

Assets-Liabilities = Net Worth _____

