

Net-Worth Calculation Worksheet



Date: _____

Assets (What You Own)

	Sole Ownership				Joint	=	Total
	Husband		Wife				
CASH:							
Checking	_____	+	_____	+	_____	=	_____
Life Insurance (face value)	_____	+	_____	+	_____	=	_____
Certificates of Deposit	_____	+	_____	+	_____	=	_____
Other	_____	+	_____	+	_____	=	_____
INVESTMENTS:							
Mutual Funds	_____	+	_____	+	_____	=	_____
Bonds	_____	+	_____	+	_____	=	_____
Stocks	_____	+	_____	+	_____	=	_____
Stock Options	_____	+	_____	+	_____	=	_____
REAL ESTATE:							
Home	_____	+	_____	+	_____	=	_____
Farm, Business	_____	+	_____	+	_____	=	_____
Other	_____	+	_____	+	_____	=	_____
BUSINESS INTERESTS							
Partnerships	_____	+	_____	+	_____	=	_____
Corporations	_____	+	_____	+	_____	=	_____
PERSONAL PROPERTY							
Automobiles	_____	+	_____	+	_____	=	_____
Recreational Vehicles	_____	+	_____	+	_____	=	_____
Home Furnishings	_____	+	_____	+	_____	=	_____
Antiques/Jewelry	_____	+	_____	+	_____	=	_____
RETIREMENT ACCOUNTS							
401(k) & 403(b) Plan	_____	+	_____	+	_____	=	_____
IRA Accounts	_____	+	_____	+	_____	=	_____
TOTAL	=====	+	=====	+	=====	=	=====
							TOTAL ASSETS

Liabilities (What You Owe)

LOANS							
Automotive	_____	+	_____	+	_____	=	_____
School	_____	+	_____	+	_____	=	_____
Personal	_____	+	_____	+	_____	=	_____
REVOLVING CREDIT							
Card: _____	_____	+	_____	+	_____	=	_____
Card: _____	_____	+	_____	+	_____	=	_____
Card: _____	_____	+	_____	+	_____	=	_____
Account	_____	+	_____	+	_____	=	_____
MORTGAGES							
First Mortgage					_____	=	_____
Second Mortgage					_____	=	_____
Vacation Home					_____	=	_____
OTHER							
TOTAL	=====	+	=====	+	=====	=	=====
							TOTAL LIABILITIES

(Assets minus Liabilities)

TOTAL ASSETS

TOTAL LIABILITIES

=

NET WORTH