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SP612-B Tools for Money Management: Net Worth Statement Worksheet

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Tools for Money Management

Net Worth Statement

Name _____ Date _____

Assets (what you own)

Cash	
Cash on hand	\$
Checking account	\$
Savings account	\$
Money market funds	\$
Total Cash	\$
Money Loaned to Others	
(repayment expected)	\$
Investments (market value)	
Savings bonds	\$
Stocks	\$
Bonds	\$
Mutual funds	\$
Cash value of retirement fund(s)	\$
Cash value of life insurance	\$
Certificates of deposit	\$
IRAs	\$
Cash value of annuities	\$
401(K), 403(b), 457 Plans	\$
Other	\$
Total Investments	\$
Personal Assets (market value)	
Home	\$
Other real estate	\$
Automobiles	\$
RVs, boats, etc.	\$
Home furnishings	\$
Collections	\$
Jewelry	\$
Other	\$
Total Personal Assets	\$
TOTAL ASSETS	
(Total Cash + Money Loaned to Others + Total Investments + Total Personal Assets)	\$

Liabilities (what you owe)

Bills	
Unpaid utilities	\$
Unpaid medical bills	\$
Unpaid taxes	\$
Unpaid insurance premiums	\$
Unpaid legal judgments	\$
Other unpaid bills:	\$
	\$
Total Unpaid Bills	\$
Credit/charge Card Balances	
	\$
	\$
	\$
Total Credit Card	\$
Debt	
Loans	
Home mortgage balance	\$
Second mortgage or home equity loan balance	\$
Total of other real estate loan balances	\$
Automobile loans	\$
Total student loans	\$
Loans from retirement funds or life insurance	\$
Personal loans from family or friends	\$
Other loans	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
Total Loans	\$
TOTAL LIABILITIES	
(Total Bills + Total Credit Card Debt + Total Loans)	\$
NET WORTH	
(Total Assets from page 1 minus Total Liabilities)	\$
\$	

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