

ASSETS/NET WORTH WORKSHEET

Date: _____

CASH AND CASH EQUIVALENTS

Cash, Checking, Savings Accounts \$ _____

Money Market Accounts, CDs, Savings Bonds \$ _____

LONG-TERM INVESTMENTS

Stocks, Bonds, Mutual Funds \$ _____

Real Estate (current value): Primary Home \$ _____

Other Properties \$ _____

Other _____ \$ _____

RETIREMENT ACCOUNTS

401(k), IRAs, Pensions \$ _____

Other _____ \$ _____

OTHER ASSETS

Partnership or Business Interests \$ _____

Automobiles, Other Vehicles \$ _____

Electronics, Recreational Equipment \$ _____

Art, Jewelry, Furniture, Antiques \$ _____

Other _____ \$ _____

TOTAL ASSETS \$ _____

TOTAL ASSETS	\$ _____
Subtract TOTAL DEBT/LOANS	\$(_____)
NET WORTH	\$ _____