



SEM IN A R

Net Worth Statement



Date: _____ Date: _____

ASSETS

Cash (on hand, checking/share draft, savings)	\$	\$
Certificates of deposit (CDs)		
Money market funds and accounts		
Savings bonds		
Stocks		
Mutual funds		
Individual retirement accounts (IRAs)		
401(k) or 403(b) accounts or Keogh plan		
Pension (vested interest)		
Tax-deferred annuities		
Real estate investments		
Cash value of life insurance		
Blue book value of automobiles		
Furnishings and other personal property		
Jewelry		
Collectibles		
Other assets		
TOTAL ASSETS	\$	\$

LIABILITIES

Credit and charge card debt	\$	\$
Automobile loans		
Student loans		
Home equity loans		
Other personal loans		
Business loans		
Mortgage loan		
Taxes owed		
Medical debt		
Alimony		
Other debts		
TOTAL LIABILITIES	\$	\$

ASSETS – LIABILITIES (NET WORTH): \$ _____ \$ _____