



| Net Worth | | |
|--|------------------------------------|---------------|
| | Item | Amount |
| What You Own | 1 Checking/saving accounts | \$ |
| | 2 Investment accounts | \$ |
| | 3 Stocks & Bonds | \$ |
| | 4 IRA/401(k) | \$ |
| | 5 Home/real estate | \$ |
| | 6 Automobile(s) | \$ |
| | 7 Other assets | \$ |
| | SUBTOTAL A (Add items 1-7) | \$ |
| What You Owe | 8 Mortgage | \$ |
| | 9 Credit cards | \$ |
| | 10 Credit cards | \$ |
| | 11 Auto loan(s) | \$ |
| | 12 Other loan(s) | \$ |
| | 13 Other loan(s) | \$ |
| | 14 Other debt(s) | \$ |
| | SUBTOTAL B (Add items 8-14) | \$ |
| TOTAL (To figure your net worth, subtract Subtotal B from Subtotal A) | \$ | |