

NET WORTH CALCULATION SHEET

As of _____ (date)

Assets	Value
Current Liquid Assets	
Cash on Hand	\$ _____
Checking Account	\$ _____
Savings Account	\$ _____
Certificates	\$ _____
Money Owed You	\$ _____
Tax Refund Due	\$ _____
Cash Value of Life Insurance	\$ _____
Stocks/Bonds	\$ _____
Mutual Fund Shares	\$ _____
Other: _____	\$ _____
_____	\$ _____
Total Liquid Assets	\$ _____
Fixed Assets	
Automobiles	\$ _____
Home	\$ _____
Personal Property	\$ _____
Other: _____	\$ _____
_____	\$ _____
Total Fixed Assets	\$ _____
Deferred Assets	
Retirement Plan	\$ _____
IRA	\$ _____
Other: _____	\$ _____
_____	\$ _____
Total Deferred Assets	\$ _____
Total Assets	\$ _____

(Calculate Liabilities on next page)

Liabilities	Amount Owed
Current Liabilities	
Auto Loan	\$ _____
Installment Debt	\$ _____
Personal Loan	\$ _____
Charge Accounts	\$ _____
Credit Cards	\$ _____
Mortgage Loan	\$ _____
Insurance Due	\$ _____
Taxes Due	\$ _____
Other: _____	\$ _____
_____	\$ _____
Total Liabilities	\$
<hr/>	
Net Worth (<i>Total Assets - Total Liabilities = Net Worth</i>)	\$ _____