

Net Worth Calculation Form

As of _____ (date)

Assets

Current Liquid Assets

Value

Current Cash	\$ _____
Checking Account	\$ _____
Savings Account	\$ _____
Certificates of Deposit	\$ _____
Stocks / Bonds	\$ _____
Life Insurance (Cash Value)	\$ _____
Mutual Funds	\$ _____
Other: _____	\$ _____
Other: _____	\$ _____
TOTAL LIQUID ASSETS	\$ _____

Fixed Assets

Value

Automobiles	\$ _____
Home	\$ _____
Personal Property	\$ _____
Other: _____	\$ _____
Other: _____	\$ _____
TOTAL FIXED ASSETS	\$ _____

Retirement Assets

Value

401(k) / 403(b)	\$ _____
IRA	\$ _____
Other: _____	\$ _____
TOTAL DEFERRED ASSETS	\$ _____
TOTAL ASSETS	\$ _____

Liabilities

Current Liabilities

Value

Auto Loan(s)	\$ _____
Mortgage	\$ _____
Personal Loan(s)	\$ _____
Credit Card(s)	\$ _____
Insurance Due	\$ _____
Installment Debt(s)	\$ _____
Other: _____	\$ _____
Other: _____	\$ _____
TOTAL LIABILITIES	\$ _____

Calculate your current net worth by subtracting your total liabilities from your total assets.

Net Worth

Total Assets	\$ _____
Total Liabilities	- \$ _____
NET WORTH	\$ _____