

# How to Customize Your Net Worth Form

**Step 1:** Open this document using a PDF reader, such as Adobe Acrobat Reader. You can download this software for free at <http://get.adobe.com/reader>.

The sections you see in BLUE below can all be customized to add in your own figures.

**Step 2:** Click on the section you wish to edit and type your number. Do NOT enter any numbers in the spaces which contain a 0.00 (those are fields which will be automatically calculated for you).

**Step 3:** Click on another section in order for the totals to update.

**Step 4:** When done, your Net Worth will be calculated automatically for you.

Auto Loan(s)	\$		Auto Loan(s)	\$	
Mortgage	\$		Mortgage	\$	
Personal Loan(s)	\$		Personal Loan(s)	\$	
Credit Card(s)	\$		Credit Card(s)	\$	
Insurance Due	\$		Insurance Due	\$	
Installment Debt(s)	\$		Installment Debt(s)	\$	
Other:	\$		Other:	\$	
Other:	\$		Other:	\$	
TOTAL LIABILITIES	\$	0.00	TOTAL LIABILITIES	\$	0.00

Blue Sections to Enter Data

Do not enter anything into fields with 0.00

# 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** \$ \_\_\_\_\_