

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 \$ _____