

NET WORTH STATEMENT

ASSETS:	CURRENT VALUE
Cash in Savings Accounts	\$
Cash in Checking Accounts	\$
Certificates of Deposit (CDs)	\$
Cash on Hand	\$
Money Market Accounts	\$
Cash Value of Life Insurance	\$
Savings Bonds (current value)	\$
College fund (529 plans, other accounts)	\$
Stocks	\$
Bonds	\$
Mutual Funds	\$
Vested Value of Stock Options	\$
Other Investments	\$
Individual Retirement Accounts (IRAs, ROTH)	\$
Other retirement accounts (Keogh, SEP, etc.)	\$
401(k) or 403(b) Accounts	\$
Current Market Value of Your Home http://www.zillow.com/	\$
Market Value of Other Real Estate	\$
Blue Book Value of Cars/Trucks (Go to www.kbb.com)	\$
Boats, Planes, Other Vehicles	\$
Jewelry	\$
Collectibles	\$
Furnishings and Other Personal Property	\$
Other (Money owed to you)*	\$
TOTAL ASSETS	\$
LIABILITIES:	
Mortgages (Total owed)	\$
Home Equity Loan	\$
Home Equity Line of Credit	\$
Auto Loans	\$
Credit Card Balances	\$
Bank/Credit Union Loans	\$
401(k)/403(b)/Thrift Savings Plan Loan	\$
Student Loans	\$
Other Loans	\$
Outstanding Real Estate Taxes Owed	\$
Federal or State Income Taxes Owed	\$
Other Taxes Owed	\$
Other Debts (Business, Personal)	\$
TOTAL LIABILITIES	\$
NET WORTH (TOTAL ASSETS MINUS TOTAL LIABILITIES)	#VALUE!

A net worth statement is just a snapshot of your current financial situation. Please keep in mind the value of your assets can change as many homeowners realized during the housing crisis.

* Include only if you reasonably expect to collect!