

# NET WORTH WORKSHEET

Date (update quarterly):

\_\_\_\_ / \_\_\_\_ / \_\_\_\_

Net Worth Goal:

\$ \_\_\_\_\_

## ASSETS (What you OWN)

Home Value \_\_\_\_\_ \$ \_\_\_\_\_

Retirement Account 1 \_\_\_\_\_ \$ \_\_\_\_\_

Retirement Account 2 \_\_\_\_\_ \$ \_\_\_\_\_

Stocks 1 \_\_\_\_\_ \$ \_\_\_\_\_

Stocks 2 \_\_\_\_\_ \$ \_\_\_\_\_

Education Account 1 \_\_\_\_\_ \$ \_\_\_\_\_

Education Account 2 \_\_\_\_\_ \$ \_\_\_\_\_

Savings 1 \_\_\_\_\_ \$ \_\_\_\_\_

Savings 2 \_\_\_\_\_ \$ \_\_\_\_\_

Checking \_\_\_\_\_ \$ \_\_\_\_\_

Medical \_\_\_\_\_ \$ \_\_\_\_\_

Vehicle 1 \_\_\_\_\_ \$ \_\_\_\_\_

Vehicle 2 \_\_\_\_\_ \$ \_\_\_\_\_

Vehicle 3 \_\_\_\_\_ \$ \_\_\_\_\_

Other \_\_\_\_\_ \$ \_\_\_\_\_

Other \_\_\_\_\_ \$ \_\_\_\_\_

**TOTAL ASSETS** \$ \_\_\_\_\_

## LIABILITIES (What you OWE)

Home Mortgage \_\_\_\_\_ \$ \_\_\_\_\_

Unpaid Taxes \_\_\_\_\_ \$ \_\_\_\_\_

Car Debt 1 \_\_\_\_\_ \$ \_\_\_\_\_

Car Debt 2 \_\_\_\_\_ \$ \_\_\_\_\_

Credit Card Debt \_\_\_\_\_ \$ \_\_\_\_\_

Student Loans \_\_\_\_\_ \$ \_\_\_\_\_

Other \_\_\_\_\_ \$ \_\_\_\_\_

**TOTAL LIABILITIES** \$ \_\_\_\_\_

**NET WORTH (OWN minus OWE):**

