

Net worth calculation form

As of _____ (date)

Assets		Liabilities	
Current liquid assets	Value	Current liabilities	Amount owed
Cash on hand	\$ _____	Auto loan	\$ _____
Checking account	\$ _____	Installment debt	\$ _____
Savings account	\$ _____	Personal loan	\$ _____
Certificates of deposit	\$ _____	Credit cards	\$ _____
Money owed you	\$ _____	Mortgage loan	\$ _____
Tax refund due	\$ _____	Insurance due	\$ _____
Cash value of life insurance	\$ _____	Taxes due	\$ _____
Stocks/bonds	\$ _____	Other: _____	\$ _____
Mutual fund shares	\$ _____	_____	\$ _____
Other: _____	\$ _____	Total liabilities	\$ _____
Total liquid assets	\$ _____		
Fixed assets			
Automobiles _____	\$ _____		
Home _____	\$ _____		
Personal property _____	\$ _____		
Other: _____	\$ _____		
_____	\$ _____		
_____	\$ _____		
Total fixed assets	\$ _____		
Retirement assets			
401(k), 403(b) _____	\$ _____		
IRA _____	\$ _____		
Other: _____	\$ _____		
_____	\$ _____		
_____	\$ _____		
Total deferred assets	\$ _____		
Total assets	\$ _____		
		Net worth	
		Total assets	\$ _____
		Total liabilities	minus \$ _____
		Net worth	equals \$ _____

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

INVESTMENTS AND INSURANCE PRODUCTS:

NOT FDIC INSURED NOT BANK GUARANTEED MAY LOSE VALUE

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