



# Family Net Worth Statement Worksheet

## Assets – What you own

Cash	
Cash	
Checking account	
Savings account	
Certificates of Deposit	
Cash value of life insurance	
<b>Total Cash</b>	

Investments	
Stocks	
Bonds	
Mutual funds	
Treasury bills	
<b>Total Investments</b>	

Property	
Primary residence (market value)	
Vehicle (current blue book value)	
Jewelry	
Art	
Collectibles	
<b>Total Property</b>	

Retirement Accounts	
IRA	
401k	
403b	
<b>Total Retirement Accounts</b>	

Accounts Receivable (Any outstanding income you expect to receive)	
<b>Total Accounts Receivable</b>	

<b>Total Assets</b>	
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## Liabilities – What you owe

Real Estate	
Primary mortgage	
Second mortgage	
Home equity loan	
<b>Total Real Estate</b>	

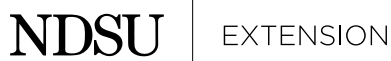
Installment Loans	
Vehicle	
Vehicle	
RV	
Boat	
Furnishings	
Appliances	
<b>Total Installment Loans</b>	

Personal Loans	
Student loans	
Medical	
<b>Total Personal Loans</b>	

Charge Accounts	
<b>Total Charge Accounts</b>	

Unpaid Bills	
Taxes	
Insurance	
Rent	
Utilities	
<b>Total Unpaid Bills</b>	

<b>Total Liabilities</b>	
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**Total Assets** \_\_\_\_\_ — **Total Liabilities** \_\_\_\_\_ = **Net Worth** \_\_\_\_\_

Carrie Johnson, Personal and Family Finance Specialist