

NET WORTH STATEMENT

	CURRENT VALUE
ASSETS:	
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	
<u>Current Market Value of Your Home http://realestate.yahoo.com/Homevalues</u>	
Market Value of Other Real Estate	
<u>Blue Book Value of Cars/Trucks (Go to www.kbb.com)</u>	
Boats, Planes, Other Vehicles	
Jewelry	
Collectibles	
Furnishings and Other Personal Property	
Other (Money owed to you)* Only include if you reasonably will collect	
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)	