

Net worth statement worksheet — your financial checkup

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In plain terms, a net worth statement compares what you own with what you owe. It is an important tool in preparing your financial plan. A net worth statement shows on paper where you stand today, but it is important to understand that your net worth will evolve as your financial circumstances change. You will want to periodically update your net worth statement so you have a record of progress toward your financial goals. This worksheet provides a starting point. You may wish to work with your advisor to discuss your net worth and future goals.

What are you worth?

Assets	Current value	Debts	Outstanding balance
Cash/CDs/money market	\$	Credit card balance	\$
Taxable investment accounts		Car loans	
Employer retirement accounts		Mortgages	
IRAs		Investment real estate loans	
Partnership interests		Loans from family	
Closely held business interests		Other loans	
Investment real estate		Income taxes due	
Personal residence		Other	
Other personal real estate			
Collectibles			
Jewelry			
Artwork			
Other personal property			
Other			
Total			
Total net worth (assets minus debts)			

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