



# Calculate your net worth

You are on a financial journey to achieve your personal vision of wealth. As with any journey, mapping out the course from here to there starts with knowing where you are.

## Assets (what you own)

| Cash                                 |    |
|--------------------------------------|----|
| Checking account(s)                  | \$ |
| Saving account(s)                    | \$ |
| CDs                                  | \$ |
| Money market funds                   | \$ |
| Retirement assets                    |    |
| 401(k)                               | \$ |
| 403(b)                               | \$ |
| IRA(s)                               | \$ |
| Pension                              | \$ |
| Home and other real estate           |    |
| Automobile value                     | \$ |
| Principal home (market value)        | \$ |
| Additional properties (market value) | \$ |
| Investment accounts                  |    |
| Brokerage                            |    |
|                                      | \$ |
|                                      | \$ |
|                                      | \$ |
|                                      | \$ |
|                                      | \$ |
|                                      | \$ |
| 529                                  |    |
|                                      | \$ |
|                                      | \$ |
|                                      | \$ |
|                                      | \$ |
|                                      | \$ |
| Annuities                            |    |
|                                      | \$ |
|                                      | \$ |
|                                      | \$ |
|                                      | \$ |
|                                      | \$ |

| Directly held investments             |    |
|---------------------------------------|----|
|                                       | \$ |
|                                       | \$ |
|                                       | \$ |
|                                       | \$ |
|                                       | \$ |
| Value of ownership interests          |    |
| Business                              | \$ |
| Partnership                           | \$ |
| Other investments                     | \$ |
| Other                                 |    |
| Cash value of life insurance policies | \$ |
| Money owed to you                     | \$ |
| Other investable assets               | \$ |
| Personal items (car, art, jewelry)    |    |
|                                       | \$ |
|                                       | \$ |
|                                       | \$ |
|                                       | \$ |
|                                       | \$ |
|                                       | \$ |
|                                       | \$ |
|                                       | \$ |
|                                       | \$ |
|                                       | \$ |
|                                       | \$ |
|                                       | \$ |
| Total assets                          |    |
|                                       | \$ |

## Liabilities (what you owe)

### Real estate loans (outstanding balance)

|                                 |    |
|---------------------------------|----|
| Principal home mortgage(s)      | \$ |
| Additional property mortgage(s) | \$ |
| Home equity loans               | \$ |

### Other loan types (outstanding balance)

|                                  |    |
|----------------------------------|----|
| Automobile                       | \$ |
| College                          | \$ |
| Personal                         | \$ |
| Loans against 401(k)s            | \$ |
| Loans against insurance policies | \$ |

### Balance on unpaid bills (e.g., credit card debt)

| Company | Interest rate | Balance |
|---------|---------------|---------|
|         |               | \$      |
|         |               | \$      |
|         |               | \$      |
|         |               | \$      |
|         |               | \$      |

### Unpaid tax bills (income and property)

|         |    |
|---------|----|
| Federal | \$ |
| State   | \$ |
| Local   | \$ |

### Other liabilities

|  |    |
|--|----|
|  | \$ |
|  | \$ |
|  | \$ |
|  | \$ |
|  | \$ |
|  | \$ |
|  | \$ |
|  | \$ |
|  | \$ |
|  | \$ |

**Total liabilities** \$

**Total assets - Total liabilities = Current net worth:** \$

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