# Net Worth Worksheet

## Current Assets
- Cash on hand
- Checking accounts
- Savings accounts
- Short-term bank CDs
- Money market accounts
- Other

**TOTAL CURRENT ASSETS**

## Investment Assets
- 401(k) or 403(b) plans
- Annuities
- IRAs
- Other retirement plans
- Long-term CDs
- Stocks
- Stock mutual funds
- Bonds
- Bond mutual funds
- Other

**TOTAL INVESTMENT ASSETS**

## Personal Property
- Automobiles
- Recreational Vehicles
- Home furnishings
- Collectibles
- Artwork
- Jewelry
- Other

**TOTAL PERSONAL PROPERTY**

## Real Estate
- Personal residence
- Vacation home
- Rental property
- Land
- Other

**TOTAL REAL ESTATE**

## Total Assets

**TOTAL ASSETS**

## Current Liabilities
- Department store credit cards
- Major credit cards
- Medical and dental bills
- Other

**TOTAL CURRENT LIABILITIES**

## Loans
- Automobile loans
- Educational loans
- Personal loans
- Installment contracts
- Home equity loans
- Other

**TOTAL LOANS**

## Mortgages
- Primary residence
- Vacation home
- Rental property
- Other

**TOTAL MORTGAGES**

## Total Liabilities

**TOTAL LIABILITIES**

## Net Worth

- Total Assets minus Total Liabilities

**NET WORTH**

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