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Personal Net Worth Statement

Name _____

Date _____

Tangible Assets

Residence _____
Other real estate _____
Automobiles _____
Collectibles and
other valuables _____

Total Tangible Assets: _____

Investment Assets

Total Investment Assets: _____

Retirement Assets

Total Retirement Assets: _____

Cash Assets

Checking accounts _____
Savings accounts _____
Money market funds _____
Certificates of deposit _____

Total Cash Assets: _____

Liabilities

Home mortgage _____
Home equity line of credit _____
Other mortgage _____
Auto loan(s) _____
Bank loan(s) _____
Personal loan(s) _____
Charge account debt _____
Other debt _____

Total Liabilities: _____

Net Worth

Total assets _____
Minus total liabilities _____
Equals total net worth _____

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