



College Funding Net Worth Evaluator

Your “net worth” should be evaluated from the perspective of what resources you have to help fund your child’s college education, and what liabilities you have that may keep you from reaching your goals. Net worth is simply a calculation of Assets – Liabilities.

ASSETS

Category	Name	Value	Assessable?
Real Estate	Home		
Real Estate	Other		
Investments	Stocks/Bonds		
Investments	529 Accounts		
Retirement	401k		
Retirement	SEP/IRA		
Cash	Checking		
Cash	Savings		
Cash	Money Market/CD		
Insurance	Cash Value		
Other			
TOTAL			

LIABILITIES

Category	Name	Value
Real Estate	Mortgage	
Real Estate	Other-Mortgage	
Debt	Student Loans	
Debt	Car Loan	
Debt	Credit Cards	
Debt	Medical	
TOTAL		

ASSETS – LIABILITIES = NET WORTH

_____ - _____ = _____

Although you may have a lot of liabilities, schools do not care about that part of the equation, with the exception of medical debt in some cases.

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