

NET WORTH WORKSHEET

CURRENT ASSETS	VALUE
Cash	
Checking Accounts	
Savings Accounts	
Other (Money Market, CDs, etc.) Please list:	

INVESTMENT ASSETS	VALUE
Employer Retirement Plan	
Annuities	
IRA	
Roth IRA	
Pension	
Other Retirement Assets	
Individual or Joint Investments	
Other Investment Accounts Please list:	

REAL ESTATE	VALUE
Home	
Land	
Other Home	
Rental Property	
Other Real Estate Please list:	

TOTAL ASSETS

CURRENT LIABILITIES	VALUE
Credit Cards	
Medical Bills	
Other Please list:	

LOANS	VALUE
Auto Loan	
Personal Loan	
Home Equity/Lines of Credit	
Retirement Plan Loan	
Other Please list:	

REAL ESTATE RELATED	VALUE
Primary Mortgage	
Rental Mortgage	
Other Home/Land Mortgage Please list:	

TOTAL LIABILITIES
