



Carmichael

FINANCIAL, LLC

Client Networth Statement

Client Name: _____

Date: _____

NET WORTH STATEMENT

Liquid Assets (Account Type = Checking, Savings, Money Market, CDs, Other)

Account Type	Owner	Bank or Credit Union	Annual Contributions	Current Value
Total Liquid Assets			\$0.00	\$0.00

Taxable Assets (Account Type = 529s, Annuities, Individual, Trust, Comm Property, Other)

Account Type	Owner	Investment Company	Annual Contributions	Current Value
Total Taxable Assets			\$0.00	\$0.00

Retirement Assets (Account Type = 401K, 403b, IRA, Roth IRA, Other)

Account Type	Owner	Company	Annual Contribution	Current Value
Total Retirement Assets			\$0.00	\$0.00

Real Assets (Asset Type = Vehicles, Residence, Vacation Home, Rental Home, Land)

Asset Type	Title	Location	Rental Income	Current Value
Total Real Estate Assets			\$0.00	\$0.00

Insurance Assets (Insurance Type = Life, Disability, Long Term Care)

Insurance Company & Type	Insured	Premium	Coverage	Cash Value
Total Coverage			\$0.00	\$0.00

Liabilities (Car Loans, Mortgages, HELOC, Student Loans, Credit Cards)

Debt Type	Lender	Interest %	Monthly Pmt	Loan/Debt Balance
Total Debt			\$0.00	\$0.00

Total Net Worth	\$0.00
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