

Net Worth Statement

As of _____ 20_____

Assets	TOTALS	
Cash on Hand		
Cash in Checking & Savings Accounts		
CDs & Money Market Accounts		
Money Owed to Me		
Cash Value of Life Insurance(s)		
Savings Bonds		
Investment Accounts		
Other Investments		
Individual Retirement Accounts (IRAs)		
401(k), 403(b) and other Retirement Plans		
Market Value of Real Estate Holdings		
Market Value of Cars and other Vehicles		
Jewelry and other Collectibles		
Furnishings and other Personal Property		
Total Assets	A	

Liabilities	TOTALS	
Mortgages		
Car Loans		
Bank Loans		
Student Loans		
Home Equity Loans		
Other Loans		
Credit Card Balances		
Real Estate Taxes Owed		
Income Taxes Owed		
Other Taxed Owed		
Total Liabilities	B	
Net Worth (A – B = C)	C	
Total Liabilities & Net Worth	D	

Severity of Debt

If total liabilities is greater than total assets
 subtract assets from liabilities to
 calculate severity of debt ($B - A = E$)

Total Liabilities	B	
Total Assets	A	
Severity of Debt	E	