

Name

Date

# Personal Finance Worksheet → *Calculating Your Net Worth*



## ASSETS



## LIABILITIES

### Cash and equivalents

Cash \$

Checking Account \$

Savings Account \$

Cash Value of Life Insurance and Annuities \$

### Value of Real Property

Real Estate \$

Cars / Recreational Vehicles \$

Personal Property (Art, Jewelry, Electronics, Furniture) \$

### Investments

Mutual Funds \$

Stocks \$

IRA / 401K \$

Pension Fund \$

Certificates of Deposit \$

Bonds \$

### Other Assets

Notes / Accounts Receivable \$

\$

\$

**TOTAL ASSETS** \$

### Loans

Mortgage (principal only) \$

Car Loans \$

Home Improvement Loans \$

Student Loans \$

Other Loans \$

### Debt

Credit Cards \$

Charge Accounts / Notes Payable \$

### Other

Federal / State / Local Taxes Owed \$

Contractual Obligations Owed (Rent, Tuition) \$

**TOTAL LIABILITIES** \$



## CALCULATE YOUR NET WORTH

**TOTAL ASSETS** \$

- (minus)

**TOTAL LIABILITIES** \$

---

**NET WORTH** \$