

Net Worth Statement

Attach an additional page here outlining any instructions that might be helpful to someone taking over your affairs.

ASSETS	YEAR ____	YEAR ____
Cash on hand	\$	\$
Cash in checking accounts	\$	\$
Cash in savings accounts	\$	\$
Current value of US savings bonds	\$	\$
Cash value of insurance policies	\$	\$
Equity in pensions	\$	\$
Current value of annuities	\$	\$
Retirement Funds (IRA, 401(k), 403(b), etc.)	\$	\$
Market value of securities	\$	\$
Stocks	\$	\$
Bonds	\$	\$
Mutual Funds	\$	\$
Market value of home and other real estate	\$	\$
Cash value of personal property	\$	\$
Automobile	\$	\$
Furniture	\$	\$
Appliances	\$	\$
Other (antiques, furs, jewelry, art, etc.)	\$	\$
Other assets	\$	\$
TOTAL ASSETS	\$	\$
LIABILITIES	YEAR ____	YEAR ____
Balance on mortgages	\$	\$
Balance due on installment debts, i.e. auto loan	\$	\$
Balance due on charge cards	\$	\$
Personal loans	\$	\$
Current bills outstanding	\$	\$
Taxes due	\$	\$
Other liabilities	\$	\$
TOTAL LIABILITIES	\$	\$
NET WORTH (TOTAL ASSETS – TOTAL LIABILITIES)	\$	\$