

Net Worth

	TOTAL	SELF	SPOUSE	JOINT
ASSETS (what you own)				
<i>Liquid Assets</i>				
Cash				
Checking accounts				
Savings accounts				
Money market fund				
Certificates of deposit (CDs)				
Savings Bonds / Treasuries				
Life insurance (cash value)				
Other				
Other				
Total Liquid Assets				
<i>Invested Assets</i>				
IRA accounts				
Pension - profit sharing				
401(k), 403(b), 457 plans				
Keogh accounts				
Retirement plan				
Annuities (surrender value)				
Stocks				
Bonds				
Mutual funds				
Government securities				
Rental property				
Business equity				
Receivables (money owed you)				
Limited partnerships				
Patents, copyrights				
Trusts				
Other				
Other				
Total Invested Assets				

	TOTAL	SELF	SPOUSE	JOINT
<i>Use Assets</i>				
Personal property				
Home				
Vacation home				
Automobiles				
Household furnishings				
Clothes and jewelry				
Antiques, collectibles				
Boats, RVs, etc.				
Other				
Other				
Total Use Assets				
Total Assets (liquid, invested & use)				
LIABILITIES (what you owe)				
Debts				
Medical / Dental				
Taxes owed				
Education loans				
Alimony				
Child support				
Mortgage				
2nd mortgage				
Business loans				
Personal loans				
Pledges				
Contracts				
Property taxes owed				
Mortgage on rental property				
Home equity loans				
Credit card debt				
Other				
Other				
Total Liabilities				
TOTAL ASSETS (from above)				
TOTAL LIABILITIES (from above)				
NET WORTH (Assets minus Liabilities)				