

## What's Your Net Worth? Quick Look

### GENERAL ASSETS (what you own)

Current Value

Savings/ Checking Accounts	\$
Savings Bonds/ Bank CD's	\$
Cash Value of Life Insurance	\$
Other: _____	\$

### Personal

Primary Home	\$
Vacation Home	\$
Vehicle (Cars, Trucks, Boats)	\$
Home Furnishings (Including Art, Antiques, Coins, Collectibles, Jewelry)	\$
Other: _____	

### Employer Related

Deferred Compensation	\$
Stock Options	\$
Other: _____	\$

**General Assets Total \$**

### INVESTED ASSETS (your investments)

Current Value

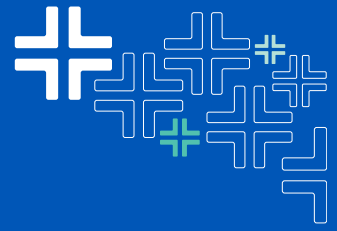
### Taxable Accounts

Brokerage	\$
Other: _____	\$

### Retirement/ College Savings

IRA's	\$
401(k), 403(b) or 457 Plans	\$
Pension Plans	\$
Annuity (Accumulated Value)	\$
College Savings	\$
Other: _____	\$

**Invested Assets Sub Total \$**



# What's Your Net Worth? Quick Look

## INVESTED ASSETS (continued)

Current Value

### Ownership Interests

Real Estate (Rental Property or Land)	\$
Business Ownership	\$
Other: _____	\$

**Invested Assets Total** \$

+  = **Total Assets** \$   
General Assets                      Invested Assets

## LIABILITIES (What you owe)

Current Value

### Current

Credit Card Balances	\$
Estimated Income Tax Owed	\$
Other Outstanding Bills	\$

**Current Liabilities Total** \$

### Long-Term

Home Mortgage/ Home Equity	\$
Anticipated Cost of Child(ren)'s College	\$
Mortgage on Rental Properties	\$
Car Loans	\$
Personal Student Loans	\$
Life Insurance Policy/ 401k Loans	\$
Other Long-Term Debt	\$

**Long-Term Liabilities Total** \$

+  = **Total Liabilities** \$   
Current Liabilities                      Long-Term Liabilities

-  = **Your Net Worth** \$   
Total Assets                      Total Liabilities