

Net Worth Statement Date: _____

Assets:

Principle Residence \$ _____

Secondary Residence (Cottage, etc.) \$ _____

Investments:

401K \$ _____

IRA \$ _____

Other: (Gold, Silver, etc.) \$ _____

Equities or Bonds \$ _____

Personal Assets (contents, boat, cars, etc.) \$ _____

Other Assets \$ _____

Total Assets: \$ _____

Liabilities:

Mortgages (Principle or Secondary) \$ _____

Car or Boat Loans \$ _____

Investment Loans \$ _____

Student Loans, etc. \$ _____

Personal Loans \$ _____

Total Liabilities \$ _____

Net Worth (Assets minus Liabilities) \$ _____