

Budget 101: net worth statement

ASSETS	AMOUNT	LIABILITY	AMOUNT
Cash		Current Debts	
Cash on Hand	_____	Credit Card 1	_____
Checking Account	_____	Credit Card 2	_____
Savings Account	_____	Credit Card 3	_____
Money Markets	_____	Other Credit Cards	_____
PayPal	_____	Back Taxes	_____
Other	_____	Medical Bills	_____
Personal Loans Owed to You	_____	Legal Bills	_____
		Child Support	_____
		Alimony	_____
		Other	_____
Real Estate		Mortgages	
Principle Residence	_____	Principle Residence	_____
Secondary Residence	_____	Secondary Residence	_____
Land	_____	Land	_____
Rental Properties	_____	Rental Properties	_____
Other	_____	Other	_____
Investments (Market Value)		Loans	
Life Insurance (Cash Value)	_____	Home Equity (HELOC)	_____
Certificates of Deposit	_____	Bank/Finance Company	_____
US Treasury Bills/Savings Bonds	_____	Car Loan	_____
Stocks	_____	Recreational Vehicle/Watercraft	_____
Bonds	_____	Student Loans	_____
Mutual Funds	_____	Life Insurance	_____
College Savings Funds (529 Plan, etc)	_____	Personal Loans (Friends & Family)	_____
Limited Partnerships	_____	Retirement Accounts	_____
Annuities	_____	Other	_____
Roth IRA	_____		
Traditional IRA	_____		
Keogh/SEP Plans	_____		
401(k), 403(b), or 457 Plan	_____		
Other	_____		
Personal Property		Total Liabilities: \$	
Cars, Trucks, Vehicles	_____		
Recreational Vehicle/Watercraft	_____		
Electronic Equipment	_____		
Home Furnishings	_____		
Home Entertainment	_____		
Equipment/Tools	_____		
Appliances & Furniture	_____		
Collectibles & Antiques	_____		
Jewelry & Furs	_____		
Other	_____		
Total Assets: \$			

Now subtract your total liabilities from your total assets to calculate your net worth:

