



Road to Wealth

# My Net Worth

So, how much are you REALLY worth?

This worksheet will help you figure it out. Just print it out, fill in a total for each category and do some simple math. If your net worth is a negative number, you may want to focus on reducing debt.

#### ESTIMATED TIME

5 Minutes a day

#### WHAT YOU'LL NEED

Bills, receipts, bank statements, payment books and other things that will help you chart where you spend money.



NAME \_\_\_\_\_

DATE \_\_\_\_\_

**What I'm worth**

**What I owe**

**PERSONAL**

- Home equity \$
- Other property equity \$
- Cars \$
- Furniture \$
- Collectibles \$
- Jewelry \$
- Cash on hand \$
- Money owed to me \$

**SAVINGS AND INVESTMENTS**

- Checking accounts \$
- Savings accounts \$
- Other accounts \$
- Annuities \$
- Life insurance cash value \$
- Stocks/bonds/CDs \$
- Mutual funds \$
- Other \$

**RETIREMENT SAVINGS**

- Pension plans \$
- 401(k) \$
- IRAs \$
- Other \$

**TOTAL ASSETS**

\$

**PERSONAL**

- Home loans \$
- Other property loans \$
- Car loans \$

**CREDIT CARDS AND PERSONAL LOANS**

- Card 1 \_\_\_\_\_ \$
- Card 2 \_\_\_\_\_ \$
- Card 3 \_\_\_\_\_ \$
- Retail credit cards \$
- Personal loans \$
- Unpaid bills \$
- Income tax owed \$
- Other debts \$

**INVESTMENT DEBT**

- School loans \$
- Business loans \$
- Investment loans \$
- 401(k) loans \$
- Life insurance loans \$
- Other investment loans \$
- Other \_\_\_\_\_ \$
- Other \_\_\_\_\_ \$
- Other \_\_\_\_\_ \$

**TOTAL LIABILITIES**

\$

Total assets \$   
 - Total liabilities \$   


---

 Total net worth \$