

PERSONAL NET WORTH

Total assets _____

Total debt _____

ASSETS VS DEBT

SUMMARY OF ASSETS

Life Insurance _____

Retirement Savings _____

Investments _____

Properties _____

Cash and Cash Equivalent _____

ASSETS

Category	Item	Value
Properties	Home	
Properties	Other	
Retirement Savings	Retirement accounts	
Investments	Stocks	
Investments	Bonds	
Investments	Mutual funds	
Investments	CDs	
Investments	Bullion	
Investments	Trust funds	
Life Insurance	Health savings account	
Life Insurance	Face value of life insurance policy	
Investments	Other	
Cash and Cash Equivalent	Checking accounts	
Cash and Cash Equivalent	Savings accounts	
Cash and Cash Equivalent	Other	
Properties	Cars	
Properties	Other vehicles	
Properties	Furnishings	
Properties	Collectibles	
Properties	Jewelry	
Properties	Other luxury goods	

DEBT

Category	Value
Mortgages	
Home equity loans	
Car loans	
Personal loans	
Credit cards	
Student loans	
Loans against investments	
Life insurance loans	
Other installment loans	
Other debts	