

PERSONAL NET WORTH STATEMENT

Name:

Date:

Co-Applicant:

Email:

ASSETS

Description of Asset	Current Value (\$)
Cash (Checking, Savings, Money Market accounts)	
Retirement Accounts (IRA, 401k, etc.)	
Investments (Stocks, Bonds, Mutual Funds)	
Real Estate (Primary Residence)	
Real Estate (Other Properties)	
Vehicles (Cars, Boats, RVs)	
Personal Property (Jewelry, Art, Collectibles)	
Business Ownership Interests	
Other Assets	
Total Assets (A)	

LIABILITIES

Description of Liability	Amount Owed (\$)
Mortgage (Primary Residence)	
Mortgage (Other Properties)	
Car Loans	
Student Loans	
Credit Card Debt	
Personal Loans / Lines of Credit	
Tax Liabilities	
Other Liabilities	
Total Liabilities (B)	

Total Assets (A)

Less: Total Liabilities (B)

NET WORTH (A - B)
