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NET WORTH STATEMENT

NAME(S) | AS OF DATE | PREPARED FOR

Assets (what you own)

Asset	Institution / details	Current value
Checking accounts		
Savings and money market		
Cash on hand		
Retirement accounts (401k, IRA, pension value)		
Brokerage and investment accounts		
Education savings (529)		
HSA balance		
Home (market value)		
Other real estate		
Vehicles (private-sale value)		
Business ownership value		
Life insurance cash value		
Valuables (jewelry, art, collections)		
Money owed to you		
Other assets		

Total assets	

Liabilities (what you owe)

Liability	Lender / details	Balance owed
Mortgage balance		
Home equity loan / HELOC		
Other real estate loans		
Car loans		
Student loans		
Credit card balances		
Personal loans		
Medical debt		
Taxes owed		
Buy-now-pay-later and store credit		
Money you owe family or friends		
Other debts		

Total liabilities	
NET WORTH	