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NET WORTH TRACKER

NAME(S)

VALUATION DATE EACH YEAR

NOTES

Assets

Category	Year 1	Year 2	Year 3	Year 4	Year 5
Cash and savings					
Retirement accounts					
Investments (taxable)					
Education and HSA					
Home and real estate					
Vehicles					
Business value					
Valuables and other					
Money owed to you					
Total assets					

Liabilities

Category	Year 1	Year 2	Year 3	Year 4	Year 5
Mortgage and home loans					
Car loans					
Student loans					
Credit cards					
Personal and other loans					
Taxes and other owed					
Total liabilities					

Net worth

	Year 1	Year 2	Year 3	Year 4	Year 5
Net worth (assets minus liabilities)					