

Personal Financial Statement Worksheet

In the space provided below, estimate the value of the asset (what you own) and the amount of the liability (the amount you owe) for the assets and liability categories that apply to your personal financial situation. Total the assets and liabilities. The difference between the total assets and total liabilities equals your personal net worth.

Personal Financial Statement of:

Date:

ASSETS		Liabilities & Net Worth	
Cash		Bank Loans	
Investments		Credit Card Debt	
IRA/401(k)		Consumer Loans	
Cash Value - Life Insurance		Personal Real Estate Mortgages	
Real Estate: Personal		Investment Real Estate Mortgages	
Real Estate: Investment		Loans Against Life Insurance	
Privately Owned Businesses		Other Liabilities	
Personal Assets		TOTAL LIABILITIES	
Other Assets		NET WORTH	
TOTAL ASSETS			