

Net Worth Worksheet		
Date:	This year	Previous Year
Assets		
A. Cash		
Checking		
Savings		
CD/Money Market		
Paypal		
Total Cash=                      A		
B. Assets		
Home		
Automobile		
Other		
Total Assets=                      B		
C. Investments		
Brokerage		
Stocks		
Other		
Total Investments=                      C		
D. Total Assets (A+B+C)=                      D		
Liabilities		
Credit card		
Home loan		
Car loan		
Other		
E. Total Liabilities=		
■ D Assets – ■ E. Liabilities=		
■ A divided by ■ D = % cash		
100 - % cash = % stocks		
% stocks/% cash		