

Figuring Out Your Net Worth

To figure your net worth, first add up the value of all your assets.

Next add the value of all your liabilities.

Finally, subtract the total value of your liabilities from the total value of your assets.

ASSETS:

Bank Accounts \$ _____

- Checking
- Savings
- CDs

Money Market Accounts \$ _____

Personal Property \$ _____

- Home value
- Home contents
- Automobile
- Boat/recreational vehicle
- Collectibles
- Jewelry

Retirement Savings \$ _____

- Employer-sponsored plans
- Defined benefit (pension) plan
- Annuities (cash surrender value)

Investments \$ _____

- Stocks
- Bonds
- Mutual funds
- ETFs
- Real estate/REITs
- Life insurance (cash surrender value)
- College savings plans
- Other investments

Other \$ _____

- Money you're owed
- Other assets

TOTAL ASSETS= \$ _____

LIABILITIES:

Credit Cards \$ _____

- Visa
- Mastercard
- American Express
- Other credit/charge cards

Personal Loans \$ _____

- Mortgage
- Additional mortgage/
home equity loan
- Car loan

Investment Loans

- \$ _____
- Brokerage account loan
 - 401(k) loan
 - Life insurance loan
 - Business loan
 - Other investment loans

Taxes Owed

- \$ _____
- Real estate taxes
 - Income taxes
 - Other taxes

Other \$ _____

- Current/unpaid bills
- Other debts

TOTAL LIABILITIES= \$ _____

TOTAL ASSETS
- TOTAL LIABILITIES

= NET WORTH: \$ _____

Find out more at: www.wiserwomen.org

 Like us on Facebook (facebook.com/WISERwomen)

 Follow us on Twitter (@WISERwomen)

 Connect with us on LinkedIn