

Net Worth Tracking Worksheet

Track Assets & Liabilities — Calculate Your Financial Snapshot

FOR YOUR RECORDS ONLY

CASH & BANK ACCOUNTS

Checking Account
Savings Account
Cash on Hand
Other Cash
Subtotal

INVESTMENTS

Stocks/Bonds
Mutual Funds
Cryptocurrency
Brokerage Acct
Other Investments
Subtotal

RETIREMENT & EDUCATION SAVINGS

401(k) / 403(b)
IRA / Roth IRA
Pension Value
529 / Edu Savings
Subtotal

PROPERTY & OTHER ASSETS

Home Value
Vehicle(s) Value
Real Estate
Other Assets
Subtotal

TOTAL ASSETS

TOTAL ASSETS

NET WORTH SUMMARY

Total Assets

Total Liabilities

YOUR NET WORTH

(Assets – Liabilities)

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LOANS & MORTGAGES

Mortgage Balance
Home Equity Loan
Student Loans
Auto Loans
Personal Loans
Subtotal

CREDIT CARDS & OTHER DEBTS

Credit Card 1
Credit Card 2
Credit Card 3
Other Debts
Subtotal

SCENARIO ANALYSIS (OPTIONAL)

Loan Forgiveness
Expected Inheritance
Adjusted Net Worth
Market Value Adjustment
Debt Consolidation Impact

FINANCIAL ADVISORS & NOTES

Advisor/Mentor
Notes
Accountant / Tax Advisor
Legal / Estate Planner
Insurance Advisor / Agent

TOTAL LIABILITIES

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