

Net Worth Tracking Worksheet

Track Assets & Liabilities — Calculate Your Financial Snapshot

FOR YOUR RECORDS ONLY

CASH & BANK ACCOUNTS

Checking Account	<input type="text"/>
Savings Account	<input type="text"/>
Cash on Hand	<input type="text"/>
Other Cash	<input type="text"/>
Subtotal	<input type="text"/>

INVESTMENTS

Stocks/Bonds	<input type="text"/>
Mutual Funds	<input type="text"/>
Cryptocurrency	<input type="text"/>
Brokerage Acct	<input type="text"/>
Other Investments	<input type="text"/>
Subtotal	<input type="text"/>

RETIREMENT & EDUCATION SAVINGS

401(k) / 403(b)	<input type="text"/>
IRA / Roth IRA	<input type="text"/>
Pension Value	<input type="text"/>
529 / Edu Savings	<input type="text"/>
Subtotal	<input type="text"/>

PROPERTY & OTHER ASSETS

Home Value	<input type="text"/>
Vehicle(s) Value	<input type="text"/>
Real Estate	<input type="text"/>
Other Assets	<input type="text"/>
Subtotal	<input type="text"/>

TOTAL ASSETS

TOTAL ASSETS	<input type="text"/>
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NET WORTH SUMMARY

Total Assets	Total Liabilities	YOUR NET WORTH
<input type="text"/>	<input type="text"/>	<input type="text"/>

(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	<input type="text"/>
Credit Card 2	<input type="text"/>
Credit Card 3	<input type="text"/>
Other Debts	<input type="text"/>
Subtotal	<input type="text"/>

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

TOTAL LIABILITIES

DISCLAIMER: This calculator is provided solely for informational and illustrative purposes. It does not constitute legal, tax, payroll, financial, or employment advice and should not be relied upon as such. All calculations are estimates and may not reflect actual compensation figures or comply with applicable laws, regulations, or standards in any jurisdiction. Make Money Unstoppable Inc. makes no representations or warranties, express or implied, regarding the accuracy, completeness, or reliability of the results. Users are responsible for verifying all inputs and outputs independently and are strongly encouraged to consult qualified professionals before making any financial or employment-related decisions based on this tool. By using this calculator, you acknowledge and accept full responsibility for its use. Make Money Unstoppable Inc. shall not be liable for any loss, damage, or consequences arising from such use. If you do not agree with these terms or are uncomfortable using this tool, please refrain from doing so.