

Net Worth Worksheet

Date: _____

*Fill in the blanks and the number will be auto-calculated

Assets

Category	Amount
Liquid Assets	
Cash	\$ 1,300.0
Checking accounts	\$ 5,392.3
Savings accounts	\$ 8,123.3
Stocks	\$ 2,481.0
Treasuries	\$ -
Bonds	\$ 230.0
Mutual funds	\$ 2,144.0
Money-market funds	\$ -
Others	\$ -
Total Liquid asset	\$ 19,670.6
Non-liquid Assets	
Properties	\$ 36,000.0
Life insurance	\$ 5,000.0
Companies	\$ -
Vehicles	\$ -
Retirement Accounts	\$ -
Others	\$ -
Total Non-liquid asset	\$ 41,000.0

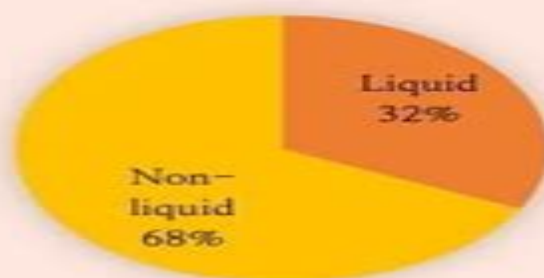
Liabilities

Category	Amount
Credit cards	\$ 427.0
Student Loan	\$ 8,241.0
Mortgage	\$ 12,000.0
Vehicle loan	\$ -
Others	\$ -

Net worth

Total assets	\$ 60,670.6
Total liabilities	\$ 20,668.0
Current Net worth	\$ 40,002.6
Net worth goal	\$ 1,000,000.0
Finish %	4%

Asset



Liability



How To Calculate Your Net Worth Worksheet

Vickie L. Bajtelsmit



How To Calculate Your Net Worth Worksheet:

Ernst & Young's Personal Financial Planning Guide Ernst & Young LLP, Martin Nissenbaum, Barbara J. Raasch, Charles L. Ratner, 2004-10-06 If you want to take control of your financial future and unlock the doors to financial success you must have a plan that will allow you to find good investments reduce taxes beat inflation and properly manage money Whether you are new to financial planning or a seasoned veteran this updated edition of Ernst & Young's Personal Financial Planning Guide provides valuable information and techniques you can use to create and implement a consistent personalized financial plan It also takes into consideration the new tax rules that affect home ownership saving for college estate planning and many other aspects of your financial life Filled with in depth insight and financial planning advice this unique guide can help you Set goals Build wealth Manage your finances Protect your assets Plan your estate and investments It will also show you how to maintain a financial plan in conjunction with life events such as Getting married Raising a family Starting your own business Aging parents Planning for retirement Financial planning is a never ending process and with Ernst & Young's Personal Financial Planning Guide you will learn how to tailor a plan to help you improve all aspects of your financial life **Making Money Simple** Peter Lazaroff, 2019-03-27 Simplify your financial life and ensure financial success into the future Feeling paralyzed by the overwhelming number of complex decisions you need to make with your money You don't need to be an expert to achieve financial freedom You just need a framework that makes the right choices simple and easy to make Making Money Simple provides that much needed process so you can get on the right track to long term financial security This valuable resource provides a solid foundation for all the nuanced personal finance decisions you need to make as you go through your career hit major life milestones and look to grow wealth It's a blueprint for financial achievement even through tough to navigate situations where there are no clear cut rules After you read Making Money Simple you will be able to create your personal plan for success using proven wealth management methods and real world financial strategies From basic financial principles to advanced investing techniques you will get comprehensive coverage of fundamental financial topics with easy to follow advice from author Peter Lazaroff who draws from his expertise as the Chief Investment Officer of a multi billion dollar wealth management firm to give you the tools you need to simplify your financial situation and make the right moves at every opportunity Getting your finances in order doesn't have to be hard It doesn't require fancy convoluted investment strategies Nor does it require keeping track of detailed spreadsheets You just need this step by step process to get your financial house in order and keep it that way forever It doesn't matter what your specific situation is We all need to understand our money and what to do with it Making Money Simple shows you how to Develop clear financial goals and plan for your future Understand the three crucial elements of building a strong financial house Implement effective investment strategies to grow your wealth and avoid costly mistakes Learn ten smart questions to ask when hiring financial professionals For those seeking to secure a solid financial future Making Money Simple A Complete Guide to Getting Your Financial House

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