

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

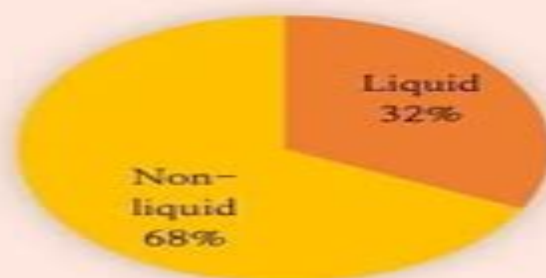
Liabilities

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

**Ernst & Young LLP, Martin
Nissenbaum, Barbara J. Raasch, Charles
L. Ratner**

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 in Order and Keeping It That Way Forever is the roadmap to get you there

Understanding Credit Dave Ravindra, 2011-05-25 *Understanding Credit* is the definitive guide to understanding what credit is how it is reported and how to make it work for you This handbook reveals the strategies and techniques that professionals use to borrow credit effectively It offers an uncomplicated view of credit in Canada from explanations of the different forms of credit available to advice on how to determine the best option for each individuals needs Using credit does not mean getting into debt when used wisely it can enable anyone to realize their dreams as well as save and invest for the future Tables and examples are included to illustrate how interest payments work and how the real cost of borrowing money differs between the different types of credit Author Dave Ravindra also offers information explaining where to find the right lending institution and how to qualify for the credit needed The provided list of resources covers everything from government legislation to Canadas major banks Sample letters are also included to use when requesting your credit report and monthly budget sheets enable you to work out what you can afford to pay Everything you need to understand credit is contained in this handy guide Using the guidance offered here you can build a solid credit report in as short a time as possible **The**

Money Book of Personal Finance Walter Updegrave, Michael Sivy, Money Magazine, Eric Schurenberg, Joseph S Coyle, Marguerite Smith, Mark Levine, 2008-11-15 Which mutual funds are best How much money do most people make When should I take my retirement Where is the best place to invest college savings for my child Who does the IRS audit most Should I rent a home or buy one Why can't I save any money The Money Book of Personal Finance has the answers to these questions and hundreds more real answers for real life questions like yours Written by experts fully illustrated with easy to understand tables and graphs the chapters in this book will tell you everything you need to know to make the money decisions that will help you immediately and secure your financial future Personal Finance Workbook For Dummies

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