

Calculate Your Net Worth

The most straightforward way to see how you are doing financially is to calculate your net worth. Your net worth is essentially a snapshot of your assets minus your liabilities. It can be a useful tool to measure your financial progress from year to year.

Assets	Total
Bank/Credit union accounts and other liquid assets	\$
Investments-Mutual funds	\$
Investments-Other	\$
Retirement and other tax-deferred assets	\$
Other qualified benefit plans	\$
Non-qualified benefit plans	\$
Real estate	\$
Personal assets-Current market value	\$
Miscellaneous/Other assets	\$
Total Assets	\$
Liabilities	
Current unpaid bills	\$
Credit card balances	\$
Consumer loans	\$
Home mortgage	\$
Other mortgages	\$
Home Equity Line of Credit (HELOC)	\$
Student loans	\$
Loans against life insurance or 401(k)	\$
Other	\$
Total Liabilities	\$
Net Worth (total assets minus total liabilities)	\$

Notes:



APRIL CALDWELL

BLAZE YOUR TRAIL