



# WHAT'S MY NET WORTH?

Your individual net worth is what you own minus what is owed. A consistent increase in net worth indicates that you are on the way to good financial health.

Use this worksheet to figure out your current net worth and then use that figure to help you decide what you would like to save for. The funds you contribute to your total assets can help you save for your goal whether it be your child's education, a dream vacation, or retirement.

Would you like to discuss your financial planning and goals? FORUM Private Client Group provides investment advisory, financial planning, and tax services. Visit [www.forumcu.com/pcg](http://www.forumcu.com/pcg) to find out more.

## Assets

Checking accounts: _____	IRA: _____
Savings accounts: _____	Roth IRA: _____
Money market accounts: _____	401k: _____
Savings bonds: _____	Pension: _____
CD's: _____	Principal home: _____
Cash value of life insurance: _____	Vacation home: _____
Brokerage: _____	Cars, trucks, boats: _____
Other: _____	
Total Assets: _____	

## Liabilities

Credit card balances: _____	Mortgage on rental properties: _____
Estimated income tax owed: _____	Car loans: _____
Other outstanding bills: _____	Student loans: _____
Home mortgage: _____	Life insurance policy loans: _____
Home equity loan: _____	Other long-term debt: _____
Total Liabilities: _____	

## Assets – Liabilities = Net Worth

\_\_\_\_\_

