

NET WORTH DATA SHEET

In the next two financial work sheets, fill in the data according to your current financial circumstances. Then fill in your 1, 5, & 10 year goals for each category.

ASSETS	NOW (EXPRESSED IN CURRENT VALUE)	1 YEAR GOAL	5 YEAR GOAL	10 YEAR GOAL
Cash				
Bank				
Checking				
Savings				
Certificates				
Saving Bonds				
Other Bonds				
Life Insurance				
Mutual Funds				
Retirement Plans				
Private Pension Plan				
Profit Sharing Plan				
Home Mortgage - Market Value				
Other Real Estate				
Car(s) Loans - Market Value				
Furniture				
Large Appliances				
Antiques/Art				
Jewelry				
Silverware				
Stamp/Coin Collection				
Debts Others Owe You				
Other				

Total Assets				
LIABILITIES	NOW (Expressed in current value)	1 YEAR GOAL	5 YEAR GOAL	10 YEAR GOAL
Current Bills				
Charge Accounts				
Credit Cards				
Taxes				
Installments				
Mortgages				
Other				
Total Liabilities				
Net Worth (total assets minus total liabilities)				