

Net Worth Worksheet

PREPARED FOR:

DATE: / /

You'll need:

- Most recent investment statements for taxable and superannuation accounts
- Most recent bank statements
- An estimate of the current market value of your home(s)
- Most recent credit card statement(s), if you have a balance on your card
- Most recent mortgage and home equity loan statements
- Most recent statements from any other debts you owe, such as HECS or auto loans

NET WORTH: ASSETS

	You	Spouse	Joint	Total
Bank accounts	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Term deposits	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Managed funds / ETFs	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Stocks	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Bonds	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Superannuation	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Primary residence	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Investment property	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other assets (specify)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TOTAL: Assets	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

NET WORTH: DEBT

	You	Spouse	Joint	Total
Mortgage	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Home equity loan	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Car loan	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
HECS loan	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Credit card debt	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other debt (specify)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TOTAL: Debt	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

TOTAL: Assets	<input type="text"/>	– TOTAL: Debt	<input type="text"/>	= TOTAL: Net Worth	<input type="text"/>
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