Ground Up Financial Coaching

Net Worth Statement

		Name:	Name:	Joint	Total
Assets					
Liquid Assets					
	Total Liquid Assets				
Taxable Assets					
	Total Taxable Assets				
Tax-Qualified Assets					
	Total Tax-Qualified Assets				
Tax-Free Assets					
	Total Tax-Free Assets				
Personal Assets					
	Total Personal Assets				
Total Assets					
Liabilities					
Short-Term Debt					
	Total Short-Term Debt				
Medium-Term Debt					
	Total Medium-Term Debt				
Long-Term Debt					
	Total Long-Term Debt				
Total Liabilities					
Total Net Worth					

Instructions

1) List all accounts in the light gray boxes and their corresponding balances under the owner of the account. Make sure to enter the accounts in the correct category (for example, bank accounts under "Liquid Assets".

2) Enter the category subtotals for each row/column in the blue boxes.

3) Enter the totals from the asset categories in the green boxes and the totals from the liability categories in the red boxes.

4) Subtract the total liabilities from the total assets and enter in the yellow box.