WHAT'S YOUR NET WORTH?



Net worth is a comprehensive method of mapping your financial standing, calculated by subtracting your liabilities from your assets. Assets include everything you own, such as real estate, investments, and savings, while liabilities encompass debts and other financial obligations. Monitoring your net worth provides a holistic view of your financial health, offering insights into your progress and helping you stay on course towards your financial goals.

LIABIL

ASSETS	Savings and checking accounts:	
	CDs, money market funds:	
	Market value of primary residence:	
	Market value of investment properties:	
	Stocks, bonds, mutual funds:	
	401(k)s, IRAs, annuities:	
	Current value of a business(es):	
	Trust funds, art, collectibles, jewelry, vehicles:	
	TOTAL ASSETS:	
2 Abilities	Balance on primary residence:	
	Balances on investment properties:	
	Balance on auto loans:	
	Balance on business loan(s):	
	Balances on credit card and student loan(s):	
	Balance on personal/renovation loan(s):	
	TOTAL LIABILITIES:	
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YOUR NET WORTH: (Subtract TOTAL LIABILITIES from TOTAL ASSETS):



NET WORTH

State License Information: AL - License #23236 Consumer Credit #23235 | AR - License #109143 | CO – Mortgage Co. Registration | IA - License #2019-0026 | KS - License #0025618 | LA – Residential Mortgage Lending License | MO – License #132111 | NC - License# L-214968 | MLS-132111 South Carolina-BFI Mortgage Lender | TN - License #143118 | TX – SML Mortgage Banker Registration | OK - License #132111

