

**Sample Net Worth  
and Income Form**

8/9/2022

<b>ASSETS</b>		<b>LIABILITIES</b>	
<b><u>Cash and Bank Accounts</u></b>		<b><u>Credit Cards</u></b>	
	<b><u>Amount</u></b>		<b><u>Amount</u></b>
Cash	\$0.00	Bank Credit Cards	\$0.00
Checking	0.00	Department Store Cards	0.00
Savings	0.00	Installment Purchases	0.00
CDs	0.00		
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TOTAL Cash and Bank Accounts	\$0.00	TOTAL Credit Cards	\$0.00
<b><u>Real Estate (Cost Basis)</u></b>		<b><u>Other Liabilities</u></b>	
Primary Residence	\$0.00	Home Mortgage	\$0.00
Vacation Home	0.00	Vacation/Rental Home Mortgage	0.00
Rental Property	0.00	Equity Source Account	0.00
(\$000,000 Market Value)	-----	Automobile Lease/Loan	0.00
TOTAL Real Estate	\$0.00		
		TOTAL Other Liabilities	\$0.00
			=====
<b><u>Investment Accounts</u></b>		<b>TOTAL LIABILITIES</b>	
Brokerage	\$0.00		<b>\$0.00</b>
Financial Management	0.00		=====
Universal Life Insurance	0.00		
Annuities	0.00		
US Savings Bonds	0.00		
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TOTAL Investments	\$0.00	<b>TOTAL NET WORTH ----&gt;</b>	<b>\$0.00</b>
			=====
<b><u>Retirement Accounts</u></b>		<b>RETIREMENT BENEFITS / INCOME</b>	
Employee 401k	\$0.00	<b><u>Pensions (Monthly)</u></b>	
Spouse 401k	0.00	Pension Payments	\$0.00
Traditional IRA	0.00	Spouse Pension Payments	0.00
Roth IRA	0.00		
Spouse IRA	0.00		
Variable Annuity IRA	0.00		
	-----	TOTAL Pensions	\$0.00
TOTAL Retirement	\$0.00		
		<b><u>Social Security (Monthly)</u></b>	
<b><u>Other Assets</u></b>		Social Security Payments	\$0.00
Stock Options	\$0.00	Spouse Social Security Payments	0.00
Deferred Comp./Awards	0.00		
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TOTAL Other	\$0.00	TOTAL Soc Sec	\$0.00
<b>TOTAL ASSETS</b>	<b>\$0.00</b>	<b><u>Other (Monthly)</u></b>	
		Stock Dividends	\$0.00
		Annuities	0.00
		IRAs	0.00
		Spouse IRAs	0.00
		Rental Income	0.00
		TOTAL Other	\$0.00
		Total Monthly Retirement Income	\$0.00
		<b>TOTAL Annual Retirement Income</b>	<b>\$0.00</b>
			=====
		<b>RETIREMENT BUDGET</b>	
		Mandatory Expense	\$0.00
		Discretionary Expense	0.00
		<b>Total Annual Expense</b>	<b>\$0.00</b>
			=====
		<b>INCOME BETTER/(WORSE) EXPENSE</b>	<b>\$0.00</b>