



# Historical Net Worth

**DATES OF PRIOR STATEMENTS**

\_\_\_\_ / \_\_\_\_ / \_\_\_\_    \_\_\_\_ / \_\_\_\_ / \_\_\_\_    \_\_\_\_ / \_\_\_\_ / \_\_\_\_    \_\_\_\_ / \_\_\_\_ / \_\_\_\_    \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**PERSONAL ASSETS & LIABILITIES**

<i>Personal Cash</i>	_____	_____	_____	_____	_____
<i>Real Estate</i>	_____	_____	_____	_____	_____
<i>Cash Values of Insurance</i>	_____	_____	_____	_____	_____
<i>Personal Property</i>	_____	_____	_____	_____	_____
<i>Loans</i>	_____	_____	_____	_____	_____
<i>Credit Cards</i>	_____	_____	_____	_____	_____
<i>Other Debts</i>	_____	_____	_____	_____	_____
<b>SUBTOTAL</b>	<b>\$</b> _____	<b>\$</b> _____	<b>\$</b> _____	<b>\$</b> _____	<b>\$</b> _____

**INVESTMENT ASSETS & LIABILITIES**

<i>Investment Cash</i>	_____	_____	_____	_____	_____
<i>Stocks &amp; Stock Mutual Funds</i>	_____	_____	_____	_____	_____
<i>Bonds &amp; Bond Mutual Funds</i>	_____	_____	_____	_____	_____
<i>Stock Options</i>	_____	_____	_____	_____	_____
<i>Retirement Plans</i>	_____	_____	_____	_____	_____
<i>Notes Receivable</i>	_____	_____	_____	_____	_____
<i>Real Estate</i>	_____	_____	_____	_____	_____
<i>Partnerships</i>	_____	_____	_____	_____	_____
<i>Business Interests</i>	_____	_____	_____	_____	_____
<i>Annuities</i>	_____	_____	_____	_____	_____
<i>Cash Value of Insurance</i>	_____	_____	_____	_____	_____
<i>Other Investment Properties</i>	_____	_____	_____	_____	_____
<i>Loans</i>	_____	_____	_____	_____	_____
<i>Credit Cards</i>	_____	_____	_____	_____	_____
<i>Other Debts</i>	_____	_____	_____	_____	_____
<b>SUBTOTAL</b>	<b>\$</b> _____	<b>\$</b> _____	<b>\$</b> _____	<b>\$</b> _____	<b>\$</b> _____

**NET WORTH**    **\$** \_\_\_\_\_    **\$** \_\_\_\_\_    **\$** \_\_\_\_\_    **\$** \_\_\_\_\_    **\$** \_\_\_\_\_