

NET WORTH WORKSHEET

KYM GYM™: Know Your Money to Grow Your Money

ASSETS: What Do You OWN?

Cash Equivalents (Bank accounts, etc.)	Value at Month End
Checking	
Checking	
Savings	
Money Market	
Life insurance cash value	
Emergency Fund	
Other	
Total Cash Equivalents	A:

Retirement Investments	
401k / 403b / 457	
IRA	
Roth IRA	
SEP	
Other	
Total Retirement Investments	B:

Taxable Investments	
Brokerage	
Stocks	
Other	
Total Taxable Investments	C:

Investments for Kids	
UTMA/UGMA	
College Fund - 529	
College Fund - 529	
Other	
Other	
Total Investments for Kids	D:

Physical Assets	
Primary Residence (Current value)	
Car (Current value)	
Coins, gold, silver, diamonds	
Other	
Other	
Total Physical Assets	E:

Total Assets (Add: A + B + C + D + E)	F:
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Is Your Relationship in the Red?
FREE Quiz at: www.robyncrane.com

LIABILITIES: What Do You OWE?

Secured Liabilities

Primary Residence (mortgage)	
Car Loan	
Other	
Other	
Total Secured Liabilities	G:

Unsecured Liabilities

Credit Card	
Credit Card	
Student Loan	
Student Loan	
Other	
Other	
Total Secured Liabilities	H:

Total Liabilities

I:

Your Net Worth:

Assets - Liabilities: (F minus I)

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