

Net Worth Statement



Date

Member Name

Joint Member Name

Assets	
Liquid Assets	
Chequing account(s)	
Savings accounts (s)	
GICs / Term Deposits	
Life Insurance Cash Value	
Other	
Total	
Investments	
RRSPs	
TFSAs	
Pension	
Other	
Total	
Personal Assets	
Personal Residence	
Other Real Estate	
Vehicles	
Other	
Total	
Other Assets	
Notes Receivable	
Total	
Total Assets	

Liabilities	
Current Liabilities	
Credit Card(s)	
Taxes Owed	
Other	
Total	
Long Term Liabilities	
Mortgage (Personal Residence)	
Mortgage (Other Real Estate)	
Student Loans	
Vehicle Loans	
Other Loans / Lines of Credit	
Total	
Total Liabilities	

Net Worth	
Total Assets	
Total Liabilities	
Total Net Worth	

Short Term Goals
Long Term Goals