

Net Worth Worksheet

Before our next appointment, please complete this worksheet. Once we have this information we can further understand where you are now and help guide you to where you want to be in the future.

Name: _____ Date: _____

Assets (What You Own)	
Cash:	
In wallet	\$
Chequing account(s)	\$
Saving account(s)	\$
Total	\$
Real Estate / Property Assets:	
Home(s)	\$
Income properties / land	\$
Automobile(s)	\$
Other (artwork, jewelery, electronics)	\$
Total	\$
Investments:	
TFSA	\$
RRSP	\$
Spousal RRSP	\$
LIRA	\$
RESP	\$
Pension plan	\$
Investment account	\$
Corporate account	\$
Other	\$
Total	\$

Liabilities (What You Owe)	
Loans:	
Mortgage(s)	\$
Car loan / lease	\$
Personal line of credit	
Other loans	\$
Total	\$
Debts:	
Income tax / property taxes owing	\$
Credit card balance(s)	\$
Child support / alimony	\$
Legal	\$
Unpaid bills	\$
Other debts	\$
Other obligations	\$
Other	\$
Total	\$

Assets and Liabilities	
Total Assets	\$
Total Liabilities	\$
Total Net Worth	\$

