



Calculate your net worth

You are on a financial journey to achieve your personal vision of wealth. As with any journey, mapping out the course from here to there starts with knowing where you are.

Assets (what you own)

Cash	
Checking account(s)	\$
Saving account(s)	\$
CDs	\$
Money market funds	\$
Retirement assets	
401(k)	\$
403(b)	\$
IRA(s)	\$
Pension	\$
Home and other real estate	
Automobile value	\$
Principal home (market value)	\$
Additional properties (market value)	\$
Investment accounts	
Brokerage	
	\$
	\$
	\$
	\$
	\$
	\$
529	
	\$
	\$
	\$
	\$
	\$
	\$
Annuities	
	\$
	\$
	\$
	\$
	\$

Directly held investments	
	\$
	\$
	\$
	\$
	\$
Value of ownership interests	
Business	\$
Partnership	\$
Other investments	\$
Other	
Cash value of life insurance policies	\$
Money owed to you	\$
Other investable assets	\$
Personal items (car, art, jewelry)	
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
Total assets	
	\$

Liabilities (what you owe)

Real estate loans (outstanding balance)

Principal home mortgage(s)	\$
Additional property mortgage(s)	\$
Home equity loans	\$

Other loan types (outstanding balance)

Automobile	\$
College	\$
Personal	\$
Loans against 401(k)s	\$
Loans against insurance policies	\$

Balance on unpaid bills (e.g., credit card debt)

Company	Interest rate	Balance
		\$
		\$
		\$
		\$
		\$

Unpaid tax bills (income and property)

Federal	\$
State	\$
Local	\$

Other liabilities

	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$

Total liabilities

	\$
--	----

Total assets - Total liabilities = Current net worth: \$

© 2023 BlackRock, Inc or its affiliates. All Rights Reserved. **BLACKROCK** is a trademark of BlackRock, Inc. or its affiliates. All other trademarks are those of their respective owners. Prepared by BlackRock Investments, LLC, member FINRA. This material is provided for educational purposes only. BlackRock is not affiliated with any third party distributing this material.

Not FDIC Insured • May Lose Value • No Bank Guarantee

231895T-0923



Securities and Advisory Services offered through Cadaret, Grant & Co., Inc. a Registered Investment Advisor, and Member FINRA/SIPC. Additional Advisory Services offered through Prentice Wealth Management, LLC, a SEC Registered Investment Advisor. Prentice Wealth Management and Cadaret, Grant & Co. are separate entities.

USWAM1023U/S-3145969-2/2