



## ISO Wealth: Personal NET Worth Worksheet

### Assets

Cash in Bank Accounts	\$ _____
Money Market Accounts	\$ _____
Savings Bonds	\$ _____
CD's	\$ _____
Cash Value of Life Insurance	\$ _____

### Invested Assets

Broker Account	\$ _____
Cryptocurrency	\$ _____
Private Placements	\$ _____
Other Investments	\$ _____

### Retirement Assets

Retirements Accounts	\$ _____
----------------------	----------

### Business Ownership Interests

Real Estate (Rental Properties or RIET)	\$ _____
Personal Company (Estimated Value)	\$ _____
Partnerships	\$ _____
Non-Operation Interests	\$ _____

### Other Assets

Principal Home	\$ _____
Vacation Home	\$ _____
Vehicles/Boats	\$ _____
Home Furnishings	\$ _____
Collectibles (Art, Coins, Books)	\$ _____
Other Jewelry	\$ _____

### Total Assets

\$ _____
----------



Liabilities

Credit Cards \$ \_\_\_\_\_  
Estimated Tax Owed \$ \_\_\_\_\_  
Other outstanding bills \$ \_\_\_\_\_

Long Term Debt

Home Mortgage/Equity Loan \$ \_\_\_\_\_  
Mortgages on Rental/Commercial Properties \$ \_\_\_\_\_  
Lines of Credit \$ \_\_\_\_\_  
Car Loans \$ \_\_\_\_\_  
Student Loans \$ \_\_\_\_\_  
Loans against Life Insurance \$ \_\_\_\_\_  
Other Long Term Debt \$ \_\_\_\_\_

**Total Liabilities** \$ \_\_\_\_\_

**NET WORTH (Assets - Liabilities)** \$ \_\_\_\_\_