

Buff Capital Management - Net Worth Worksheet

Assets

Liquid Assets:

Checking account balance _____
Savings/money market accounts _____
Cash value of life insurance _____
Other _____

Real Estate:

Current market value of home _____
Other _____

Personal Possessions:

Market value of auto _____
Furniture and appliances _____
Stereo, video equipment, computer _____
Jewelry _____
Other _____

Investment Assets:

Mutual funds _____
Stocks _____
CDs _____
IRAs _____
Keoghs _____
Pension/Profit sharing _____
Annuities _____
Bonds _____
Stock Options _____
Other _____

Total Assets

Liabilities

Current Liabilities:

Medical bills _____
Charge account, credit card balances _____
Balance due on auto loan _____
Other _____

Long-Term Liabilities

Mortgage Balance _____
Equity Line of credit owed _____
Student loan _____
Other _____

Total Liabilities

Net Worth

Total Assets

Total Liabilities

Net Worth (Total Assets - Total Liabilities)