

What I Own (optional)	
I Own (assets)	Amount
Chequing Account	
Savings Account	
Other Savings - Specify	
Insurance (cash value)	
Retirement Savings	
Home (market value) *	
Auto (market value) *	
Second Auto (market value) *	
Other Possessions (estimate) *	
Money Owed to Me	
Other	
Total of All I Own	

What I Owe			
I Owe (liabilities)	Amount	Minimum Monthly Payment	Interest Percentage
Mortgage (current balance)			
Home Equity Loans			
Credit Cards			
Car Loans			
Education Loans			
Family/Friends			
Other			
Total of All I Owe			

My Net Worth as of _____
(Date)

Total of What I Own - Total of What I Owe = Net Worth

_____ - _____ = _____



**Ogilvie
Daugherty**
FINANCIAL SERVICES

* Keep these values the same each time unless a new assessment is completed or a new vehicle is purchased