



## Net Worth Calculator

Estimated Net Worth:

Client #1

Include Joint Ownership

Client #2

Non Joint Ownership

Assets	
Personal Items	Estimated Value
Home (joint?)	\$ -
Vehicles	-
Jewelry	-
Artwork	-
Furniture	-
Electronics	-
Antiques	-
Other	-
Cash or Cash Equivalent	
Checking account	\$ -
Savings account	-
GIC's	-
Investment Acct (joint?)	-
Life insurance (cash value)	-
Other	-
Registered Investments	
Retirement account	\$ -
RSP Cont Room	-
Group Savings from Employer	-
Stock Trading Account	-
Other Real Estate	-
Other	-
<b>Assets Total</b>	<b>\$ -</b>

Liabilities	
Loan Balances	Estimated Value
Mortgage loan	\$ -
Home equity loan	-
Car loans	-
Real estate loans	-
Student loans	-
Other loans	-
Other Outstanding Debt	
Credit card debt	\$ -
Other debt	-
	-
	-
	-
	-
	-
	-
	-
	-
	-
<b>Liabilities Total</b>	<b>\$ -</b>

Other Assets	
A.	
B.	
C.	
D.	
E.	
F.	
G.	
H.	
Cash or Cash Equivalent	
Checking account	\$ -
Savings account	-
GIC's	-
Investment Account	-
Life insurance (cash value)	-
Other	-
Registered Investments	
Retirement account	\$ -
RSP Cont Room	-
Group Savings from Employer	-
Stock Trading Account	-
Other Real Estate	-
Other	-
<b>Assets Total</b>	<b>\$ -</b>

Liabilities	
Loan Balances	Estimated Value
Other	\$ -
Other	-
Car loans	-
Real estate loans	-
Student loans	-
Other loans	-
Other Outstanding Debt	
Credit card debt	\$ -
Other debt	-
	-
	-
	-
	-
	-
	-
	-
<b>Liabilities Total</b>	<b>\$ -</b>