

THE MONEYSENSE COMPLETE FINANCIAL PLAN KIT

WORKSHEET #3B: SUMMARY NET WORTH STATEMENT

CURRENT DATE: _____ NAME: _____

INVESTMENT ASSETS AND LIABILITIES

	ASSETS	LIABILITIES
CASH & DEPOSIT ACCOUNTS	_____	_____
OUTSTANDING DEBT	_____	_____
RRSPs	_____	_____
NON - RRSP INVESTMENTS	_____	_____
OTHER: _____	_____	_____
OTHER: _____	_____	_____
Total Investment Assets and Liabilities:	<input type="text"/>	<input type="text"/>

LONG-TERM ASSETS AND LIABILITIES

PRINCIPAL RESIDENCE	_____	_____
VEHICLE(S)	_____	_____
PENSION - DEFINED CONTRIBUTION	_____	_____
OTHER: _____	_____	_____
OTHER: _____	_____	_____
Total Long-Term Assets & Liabilities:	<input type="text"/>	<input type="text"/>

TOTAL ASSETS AND LIABILITIES

<input type="text"/>	<input type="text"/>
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NET WORTH (Assets - Liabilities)

<input type="text"/>
