

**WORKSHEET 3.3 Your Estate Net Worth Statement**

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**As of****Your name:****Date of birth:****Spouse name:****Date of birth:**

	<u>Ownership (\$)</u>			<b>Family Total</b>
	<b>You</b>	<b>Spouse</b>	<b>Joint</b>	
<b>Assets</b>				
<i>Cash and cash equivalents:</i>				
Checking and savings account				
Other				
<i>Personal and household property:</i>				
Automobiles				
Furniture				
Jewelry				
Personal effects				
Art				
Coin collections				
Other				
<i>Real estate (estimated current market value):</i>				
Residence(s)				
Other properties:				
<i>Investments (estimated current market value):</i>				
Individual stocks				
Individual bonds				
Personal mutual funds				
Other investments:				
Retirement plans:				XX
				XX
				XX
Equity interest in a business				XX
<i>Life insurance (face amount):</i>				
Personal				XX
Employer group				XX
Total assets				
<b>Liabilities</b>				
<i>Short-term liabilities:</i>				
Credit cards				
<i>Long-term liabilities:</i>				
Mortgage(s)				
Automobile loan(s)				
Other loans				
<i>Miscellaneous liabilities:</i>				
Unpaid taxes				
Estimated funeral and administrative expenses <sup>a</sup>				
Total liabilities				
Estate net worth (total assets less total liabilities)				

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<sup>a</sup>Funeral and administrative expenses can vary from 2 percent to 8 percent.