

WINNING FORMS from KMT Software, Inc.

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Form Name: STATEMENT OF NET WORTH

Using this Form: This form is a "snapshot" of your financial condition. The version shown here may be more detailed than you need, but it is easy to adapt.

Entering Data: Enter all data into the unprotected cells column E. Note that all line item descriptions are also unprotected, making them easy to change.

Printing this Form: Click the printer tool in the toolbar or choose Print from the File menu.

Statement of Net Worth

[Enter Name here](#)

[Enter Date here](#)

ASSETS

CURRENT	% OF
VALUE	TOTAL ASSETS

Liquid Assets	Cash (checking, savings accounts)	
	Short-Term Investments	
	Treasury Bills	
	Savings Certificates	
	Money Market Funds	
	Cash Value of Life Insurance	
	Total Liquid Assets	#VALUE!
Investment Assets	Notes receivable	
	Marketable Securities	
	Stocks	
	Bonds	
	Real Estate (investment)	
	Tax Incentive Investments	
	Value of Stock in DF Enterprises, Inc.	
	Retirement Funds	
	Total Investment Assets	#VALUE!
Personal Assets	Residence	
	Vacation Property	
	Art, Antiques	
	Furnishings	
	Vehicles	
	Boats	
	Other	
	Total Personal Assets	#VALUE!

TOTAL ASSETS

#VALUE!

LIABILITIES

CURRENT

% OF

VALUE TOTAL LIABILITIES

Short Term

Consumer Credit Obligations
Borrowings on Life Insurance
Installment Loans
Personal Guarantee
Accrued Income Taxes
Other Debt

Total Short-Term Liabilities

#VALUE!

Long Term

Loans to Purchase Personal Assets
Loan to Acquire Business
Mortgage on Personal Residences

Total Long-Term Liabilities

#VALUE!

TOTAL LIABILITIES

#VALUE!

#VALUE!

TOTAL NET WORTH

#VALUE!