

WINNING FORMS from KMT Software, Inc.

Choose Other Window to View Form

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
VALUE% OF
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!**