

**Sample Net Worth Statement**  
as of December 31, 20XX

**ASSETS**

**Non-retirement accounts**

Bank checking account #1	\$ 20,000
Bank checking account #2	5,000
Bank savings account	40,000
Brokerage account #1	450,000
Brokerage account #2	150,000
Restricted stock units/stock options	300,000
<b>Total non-retirement accounts</b>	<b>\$ 965,000</b>

**Retirement accounts**

Employer 401(k)	\$ 120,000
Rollover IRA	200,000
Roth IRA	50,000
SEP IRA	15,000
<b>Total retirement accounts</b>	<b>\$ 385,000</b>

**Lifestyle assets**

Primary residence	\$ 1,500,000
Vacation home	300,000
Automobiles	25,000
<b>Total lifestyle assets</b>	<b>\$ 1,825,000</b>

**Business assets**

Rental real estate	\$ 150,000
Business interests (e.g., LLC, S-corp.)	25,000
<b>Total business assets</b>	<b>\$ 175,000</b>

**Total Assets** **\$ 3,350,000**

**LIABILITIES**

Home loan on primary residence	\$ 835,000
Automobile loans	15,000
<b>Total Liabilities</b>	<b>\$ 850,000</b>

**NET WORTH** **\$ 2,500,000**