



Net Worth Tracker

Annual snapshot — fill out once a year to track your progress

Name(s) _____ Date _____

Assets — What You Own

Cash & Savings

Checking Accounts	\$	_____
Savings Accounts	\$	_____
Money Market / CDs	\$	_____
Cash on Hand	\$	_____

Investments

401(k) / 403(b)	\$	_____
IRA / Roth IRA	\$	_____
Brokerage Accounts	\$	_____
HSA	\$	_____
529 Plans	\$	_____
Crypto	\$	_____

Property

Primary Home Value	\$	_____
Other Real Estate	\$	_____
Vehicles	\$	_____
Valuable Personal Property	\$	_____
TOTAL ASSETS	\$	_____

Liabilities — What You Owe

Mortgage Balance	\$	_____
Auto Loan(s)	\$	_____
Student Loans	\$	_____
Credit Card Balances	\$	_____
Personal Loans	\$	_____
Medical Debt	\$	_____
Other Debts	\$	_____
TOTAL LIABILITIES	\$	_____

NET WORTH (Assets - Liabilities): \$ _____

YEAR	TOTAL ASSETS	TOTAL LIABILITIES	NET WORTH	CHANGE
------	--------------	-------------------	-----------	--------