

JOYCE INGRAM - FINANCIAL SERVICES

NET WORTH WORKSHEET

This is a worksheet to identify what your current snapshot of what you own (assets) and what you owe (your liabilities)

Assets - (What you own)	
Registered assets	
RRSPs, TFSA's, RESP's, FHSA, DPSP's, RRIF's	\$
Locked-in RRSP's, LIRA's, LIF's, LRIF's	\$
Pension Plan(s) - Value	\$
Other (ie. Annuities)	\$
	\$
Non Registered assets	
Chequing/ Savings/ Other accounts	\$
GIC's/ term deposits	\$
Canada Savings Bonds	\$
Investment Properties	\$
Life Insurance - what is the policy value? and/or what is the cash value?	\$
Home(s)	\$
Automobile(s)	\$
Boat(s)	\$
Total	\$ -

Liabilities (What you owe)	
Mortgage(s) what is outstanding balance?	\$
Income/ Property taxes owing	\$
Car loan / lease - what is the outstanding balances	\$
Credit card balance(s)	\$
Personal line of credit	\$
Other loans	\$
Other debts	\$
Unpaid bills	\$
Other obligations ie. (daycare, alimony payments etc)	\$
Total	\$ -

Net Worth

Assets and Liabilities (assets - liabilities)	
Total Assets	\$ -
Total Liabilities	\$ -
Net Worth	\$ -

* please note to record assets and liabilities, with realistic market value on tangible assets