

KNOWING YOUR NET WORTH

DATE:

AGE:

MARITAL STATUS:

Single Married

CHECKING

Starting Balance:
Ending Balance:

SAVINGS

Starting Balance:
Ending Balance:

INCOME

Personal Salary:
Spouse Salary:
Sales Revenue:
Service Revenue:
Interest Revenue:
Other Revenue:
TOTAL:

SAVINGS GOALS

Date	Purpose	Goal to save monthly	Total
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EXPENSES

Daily Expenses:
Monthly Expenses:
Yearly Expenses:

ACTUAL MONTHLY SAVINGS:

TOTAL SAVINGS:

LIFESTYLE WORKSHEET

CURRENT

FUTURE

Lifestyle Cost:

Guaranteed Income:

Inflation Rate:

Years To Retire:

Savings Amount:

Investment Amount:

Rate Of Return:

Retirement Age

No of Kids:

Net Worth

Can I attain my dream lifestyle on or before my target retirement age?

Yes No Maybe

CHALLENGES

HOW TO IMPROVE