

Sammy Sample Net Worth Statement

xx/xx/xxxx

Assets

401k	XXXXXXXXXX
401k Spouse	XXXXXXXXXX
Beneficiary IRA	XXXXXXXXXX
Rollover IRA Spouse	XXXXXXXXXX
Rollover IRA	XXXXXXXXXX
Total Tax Advantaged Assets	XXXXXXXXXX
Trust	XXXXXXXXXX
Trust B	XXXXXXXXXXXXXX
Joint Investment	XXXXXXXXXXXXXX
Separate Property Investment	XXXXXXXXXXXXXX
Checking	XXXXXX
Savings	XXXXXX
Total After Tax Assets	XXXXXXXXXX
Total Investment Assets	XXXXXXXXXXXXXXXXXX
Home	XXXXXXXXXXXXXXXXXX
Vacation Home	XXXXXXXXXXXXXXXXXX
Cars	XXXXXX
Total Assets	XXXXXXXXXXXXXXXXXX

Liabilities

Mortgage	XXXXXXXXXXXXXXXXXX
Total Liabilities	XXXXXXXXXXXXXXXXXX

Net Worth

XXXXXXXXXXXXXXXXXX

Protection Planning

Life Insurance Face, Location, Beneficiary
Long Term Disability
Long Term Care Policy

Will & Estate Planning

Wills In Vault Exe Date
Attorney
CPA

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