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Securities & Investment Advisory Services offered through NEXT Financial Group, Inc.

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Thierry V Sommer & Associates is not an affiliate of NEXT Financial Group, Inc.

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**PERSONAL NET WORTH STATEMENT**

**Personal Information**

Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Home Phone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell Phone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Assets**

Checking Accounts $\_\_\_\_\_\_\_\_\_\_\_\_\_

Savings Accounts $\_\_\_\_\_\_\_\_\_\_\_\_\_

Retirement Funds $\_\_\_\_\_\_\_\_\_\_\_\_\_

Investment Accounts $ \_\_\_\_\_\_\_\_\_\_\_\_\_

College Programs $ \_\_\_\_\_\_\_\_\_\_\_\_\_

Real Estate Holdings $ \_\_\_\_\_\_\_\_\_\_\_\_\_

Automobiles $\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Other Personal Property $\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Other Assets $ \_\_\_\_\_\_\_\_\_\_\_\_\_

**Total Assets $\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Liabilities**

Credit Card Balance $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Auto and Other Loans $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Installment Accounts $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mortgage Balances $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Loans Against Life Insurance $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Other Liabilities $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 **Total Liabilities**  **$\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Net Worth**

Total Assets $\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Less total Liabilities $\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Net Worth $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**