

Personal Net Worth Statement



CÔMPASS
FINANCIAL
SERVICES

Name _____ Date Prepared _____

Assets

Personal Residence _____

Real Estate Investment _____

Cash/Checking/Savings _____

Money Market/CD's _____

Auto/Other Vehicles _____

IRA's _____

Pensions _____

401K/Retirement Plans _____

Other Investments _____

Business Interests _____

Other Assets _____

Total Assets

Liabilities

Home Mortgage _____

Other Real Estate Loan _____

Home Equity Loan _____

Education Loans _____

Auto/Other Vehicles _____

Personal Loans _____

Credit Cards _____

401(k) Loan _____

Misc. Debt _____

Business Loan _____

Other Liabilities _____

Total Liabilities

Net Worth

(Total Assets - Total Liabilities)

Prior Net Worth

Change

Securities offered through LPL Financial, Member FINRA/SIPC.