

Net Worth Worksheet

Crossin Law Offices, LLC.

FINANCIAL SUMMARY		ASSETS	LIABILITIES		
			<i>Husband</i>	<i>Wife</i>	<i>Joint</i>
1	Bank Accounts [attach copies of statements]	\$	\$	\$	\$
2	Real Estate (residence) [attach copy of deed]	\$	\$	\$	\$
3	Real Estate (other) [attach copies of all deeds]	\$	\$	\$	\$
4	Savings Certificates (CDS) [attach copies of statements]	\$	\$	\$	\$
5	Stocks - Non Mutual Funds (Not Held by Broker) [attach copies of all certificates]	\$	\$	\$	\$
6	Stocks - Non Mutual Funds (Held by Broker) [attach copies of brokerage statements]	\$	\$	\$	\$
7	Bonds - Non Mutual Funds (Not Held by Broker) [attach copies of all bonds]	\$	\$	\$	\$
8	Bonds - Non Mutual Funds (Held by Broker) [attach copies of brokerage statements]	\$	\$	\$	\$
9	Mutual Funds [attach copies of statements]	\$	\$	\$	\$
10	Note and Mortgages Receivables [attach copies of Notes & Mortgages]	\$	\$	\$	\$
11	Business Interests [attach copies of stock certificates, partnership agreement and/or other documentation]	\$	\$	\$	\$
12	Inheritance, etc.	\$	\$	\$	\$
13	Automobiles	\$	\$	\$	\$
14	Jewelry & Collections	\$	\$	\$	\$
15	Non-IRA Tax Qualified Retirement Plans [attach copies of statements]	\$	\$	\$	\$
16	IRAs [attach copies of statements]	\$	\$	\$	\$
17	Life Insurance [attach copies of all policies]	\$	\$	\$	\$
18	Annuities [attach copies of all policies]	\$	\$	\$	\$
19	Other Assets [attach copies of documentation pertaining to such assets]	\$	\$	\$	\$
20	TOTALS	\$	\$	\$	\$