

Student _____

Date _____

Class _____

Teacher _____

CHAPTER 3 Money Management Strategy

Your Financial Portfolio Worksheet



What Is Your Net Worth?

Calculate your net worth by listing in the following chart all your liquid assets, personal possessions, and any other assets, as well as liabilities (what you owe). Be sure to fill in the areas in the following chart that are applicable and to list others that apply to you.

LIQUID ASSETS		
Checking account balance		
Savings accounts		
Other		
PERSONAL POSSESSIONS		
INVESTMENT ASSETS		
Total Assets		
LIABILITIES		
Total Liabilities		
Net Worth (assets – liabilities)		

Are you surprised that your net worth is as much (or as little) as it is? How much would you like your net worth to be in ten years? When you retire?

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