

**Get Rich On Purpose®**  
**Putting You On Your Path to Financial Freedom**

**Investment Net Worth Statement**

**Name:**

**Date:**

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<b>Assets</b>	<b>Total Value</b>
<i>Personal Investments</i>	
Money market accounts	\$ _____
CD's	\$ _____
Stocks	\$ _____
Bonds	\$ _____
Mutual Funds	\$ _____
Investment real estate (equity)	\$ _____
Other	\$ _____
<i>Retirement Plan Investments</i>	
IRA's	\$ _____
SEP's	\$ _____
401(k)s	\$ _____
Other	\$ _____
<b>Total Financial Assets</b>	<b>\$ _____</b>

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If you're using debt to purchase financial assets, show your net equity. Notice this Investment Net Worth statement doesn't not include any liabilities. All your personal debt will be accounted for when we calculate your Wealth Index in Chapter 5 of [Wealth Foundations, Part 1, The Basics of Getting Rich.](#)

