

# Net Worth Statement (Personal Financial Summary)

Name(s): \_\_\_\_\_

Date: \_\_\_\_\_

Purpose: Mortgage / Credit Application

## ASSETS

- Real Estate (list properties and estimated values)
- Vehicles
- Chequing & Savings Accounts
- Investments (Non-Registered)
- TFSA / RRSP / RESP
- Business Interests (if applicable)
- Other Assets

## LIABILITIES

- Mortgages
- Lines of Credit / HELOC
- Credit Cards
- Car Loans
- Personal Loans
- Student Loans
- Taxes Owing
- Other Liabilities

TOTAL ASSETS: \_\_\_\_\_

TOTAL LIABILITIES: \_\_\_\_\_

NET WORTH (Assets – Liabilities): \_\_\_\_\_

### **Notes:**

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