

Senior Net Worth Estimator

Knowing your senior's financial status is a critical part of planning for care. Without this important information you do not know how much your elder has available to pay for care or where the money is. It may take some time to gather all of this critical information. Start now. When you estimate the value of your elder's assets, use current market value. If necessary, have a professional provide you with a current market estimate.

Assets (Owned)

Cash

Cash on Hand \$ _____
 Checking Account(s) _____
 Bank Savings Accounts _____
 Money Market Account(s) _____
 Life Insurance Cash Value _____

Investments

CDs _____
 Stocks _____
 Bonds _____
 Mutual Funds _____
 Annuities _____
 IRAs _____
 Pension Plans _____
 401(k), 403(b), 457 Plans _____
 Loans Made _____
 Other: _____

Real Estate

Primary Residence _____
 Vacation Home _____
 Rental Property _____
 Other Improved Property _____
 Land _____

Personal Property

Automobile 1 _____
 Automobile 2 _____
 Boats, RVs, Motorcycles _____
 Home Furnishings _____
 Jewelry & Furs _____
 Art & Collections _____
 Other: _____

Total Assets: \$ _____

Liabilities (Owed)

Mortgages

Residence 1 \$ _____
 Residence 2 _____
 Other: _____

Other Loans

Automobile 1 _____
 Automobile 2 _____
 Boats, RVs, Motorcycles _____
 Life Insurance _____
 Bank _____
 Personal _____
 Other: _____

Other Debts

Credit Card 1 _____
 Credit Card 2 _____
 Credit Card 3 _____
 Credit Card 4 _____
 Medical/Dental _____
 Other: _____
 Other: _____
 Other: _____

Total Liabilities: \$ _____

Total Assets \$ _____
Minus Total Liabilities _____

Net Worth \$ _____