

# Net Worth Summary

Date: [Insert Date]

To: [Insert Recipient's Name]

Address: [Insert Recipient's Address]

Dear [Insert Recipient's Name],

I am writing to provide you with a summary of my current net worth as part of my estate planning process.

## Assets

- Cash and Bank Accounts: \$[Insert Amount]
- Real Estate: \$[Insert Amount]
- Investments (Stocks, Bonds, etc.): \$[Insert Amount]
- Retirement Accounts: \$[Insert Amount]
- Personal Property (Vehicles, Jewelry, etc.): \$[Insert Amount]

**Total Assets: \$[Insert Total Assets]**

## Liabilities

- Mortgage: \$[Insert Amount]
- Car Loans: \$[Insert Amount]
- Credit Card Debt: \$[Insert Amount]
- Other Loans: \$[Insert Amount]

**Total Liabilities: \$[Insert Total Liabilities]**

**Net Worth: \$[Insert Net Worth]**

This summary reflects my current financial status and is intended to assist in my estate planning discussions.

Thank you for your attention to this matter.

Sincerely,

[Your Name]

[Your Address]

[Your Phone Number]

[Your Email Address]