HFH PLANNING INC.
75 Maiden Lane, Ste. 605
New York, NY 10038
Telephone: (212) 402-5444   Fax: (212) 402-5445

NET WORTH STATEMENT

(You do not need to total)

ITEM TITLE	CLIENT	SPOUSE	JOINT	TOTAL
ASSETS				
Cash (Checking Savings accounts)				
Money Market Funds				
Treasury Bills				
Savings Certificates (CDs)				
Notes Receivable				
Cash Value of Life Insurance				
Marketable Securities: Stocks				
Marketable Securities: Bonds				
Equity in Business				
Non-Marketable Securities				
Real Estate (Investment)				
Tax Incentive Investment				
Loans Owed to You				
Other Investment Assets				
		SUB TOTAL		
DEFERRED ASSETS				
Social Security				
IRAs				
KEOGH				
Profit Sharing				
Money Purchase				
401 (k) / 403 (b)				
Pension Plan				
Other Deferred Assets				
		SUB TOTAL		
PROPERTY ASSETS	**CLIENT**	**SPOUSE**	**JOINT**	**TOTAL**
Residence				
Vacation Home				
Household Furnishings				
Art and Antiques				
Vehicles				
Boats				
Other Personal Assets				
		SUB TOTAL		

LIABILITIES				
Margin on Investments				
Borrowing on Life Insurance				
Auto Loans				
Credit Card Borrowing				
Other Installment Loans				
Education Loans				
Accrued Income Taxes				
Other Short-Term Obligations				
Mortgage on Personal Residence				
Mortgage on Vacation Home				
Charitable Pledges				
Alimony / Support Obligations				
Other Long Term Obligations				
		TOTAL		

TOTAL ASSETS
TOTAL LIABILITIES

NET WORTH

NAME: **DATE:**