

A FINANCIAL PLAN CALCULATOR: KNOW YOUR NET WORTH

Once you know where you stand, you can work with your advisor to map out the appropriate financial plan and investment strategy.

If you're saving and investing for your future, keep up the good work. But you may want to take a minute and go back to the first step in the financial planning process: calculating your net worth.

How do you determine your net worth? Simply add up all your assets and subtract all your liabilities. What's left is your net worth. Your assets are what you own, and they may include the value of your bank and retirement accounts, investments and real estate. Your liabilities may include loans, mortgages and credit card debt.

Use the following calculator to get started:

Assets

Cash (checking, savings and money market accounts, certificates of deposit, savings bonds)	\$ <input type="text"/>
Current market value of investments (mutual funds, stocks, annuities)	\$ <input type="text"/>
Your vested share of employer-sponsored retirement plans, such as 401(k) and pension plans	\$ <input type="text"/>
Current market value of your home, plus other real estate	\$ <input type="text"/>
Current market value of your car(s) or other vehicles	\$ <input type="text"/>
Cash value of insurance policies	\$ <input type="text"/>
Other assets	\$ <input type="text"/>
Total assets	\$ <input type="text"/>

Liabilities

Balance due on home mortgage	\$ <input type="text"/>
Balance due on other home-related debt	\$ <input type="text"/>
Balance due on other loans (e.g., car, education)	\$ <input type="text"/>
Balance due on credit cards	\$ <input type="text"/>
Unpaid taxes (income and/or property)	\$ <input type="text"/>
Other liabilities	\$ <input type="text"/>
Total liabilities	\$ <input type="text"/>
Total assets - Total liabilities = Net worth	\$ <input type="text"/>

The figures entered by you or others on this calculator are for hypothetical purposes only. You should enter figures that are appropriate to your individual situation. The results provided by the calculators are also intended for illustrative purposes only and accuracy is not guaranteed. Columbia Threadneedle Investments (Columbia Threadneedle) and its affiliates are not tax or legal advisers. These calculators are not intended to offer any tax, legal, financial or investment advice and does not assure the availability of or your eligibility for any specific product offered by Columbia Threadneedle, its affiliates or any other institution, nor do these calculators predict or guarantee the actual results of any investment product.

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