NET WORTH & ASSET GROWTH ANNUAL TRACKER

12-MONTH ASSETS VS LIABILITIES BALANCE SHEET

CALENDAR YEAR: 2026 / 2027 **STARTING NET WORTH: $ _____** **TARGET YEAR-END: $ _____** **ANNUAL GROWTH GOAL: +$ _____**

Net Worth Formula: NET WORTH = TOTAL ASSETS (What You Own) MINUS TOTAL LIABILITIES (What You Owe). Track quarterly to measure real wealth accumulation.

1. ASSET CATEGORIES (WHAT YOU OWN)

ASSET ACCOUNT / VEHICLE	JAN / Q1	APR / Q2	JUL / Q3	OCT / Q4	DEC / YOY
Primary Bank Checking Ac					
High-Yield Emergency Fun					
Sinking Funds & Dedicate					
Roth IRA / Traditional R					
401(k) / Workplace Pensi					
Taxable Brokerage & Inde					
Primary Real Estate Mark					
Automobiles & Tangible V					
Business Equity & Equipm					
Custom Asset: _____					
TOTAL ASSETS ($)					

2. LIABILITY CATEGORIES (WHAT YOU OWE)

LIABILITY / DEBT NAME	JAN / Q1	APR / Q2	JUL / Q3	OCT / Q4	DEC / YOY
Primary Home Mortgage Ba					
Vehicle Loan #1 Outstand					
Vehicle Loan #2 Outstand					
Federal Student Loans					
Private Student / Person					
Primary Credit Card Bala					
Secondary Credit Card Ba					
Medical / Health Treatme					
Home Equity Line of Cred					
Custom Debt: _____					
TOTAL LIABILITIES ($)					

QUARTERLY NET WORTH CALCULATOR (ASSETS MINUS LIABILITIES):

Q1 NET WORTH: $ _____ **Q2 NET WORTH: $ _____** **Q3 NET WORTH: $ _____** **Q4 NET WORTH: $ _____**

ANNUAL NET WORTH GROWTH: +$ _____ | STATUS: [ ] WEALTH ACCELERATED!