



WOMEN'S
BUSINESS
COUNCIL
—
SOUTHWEST

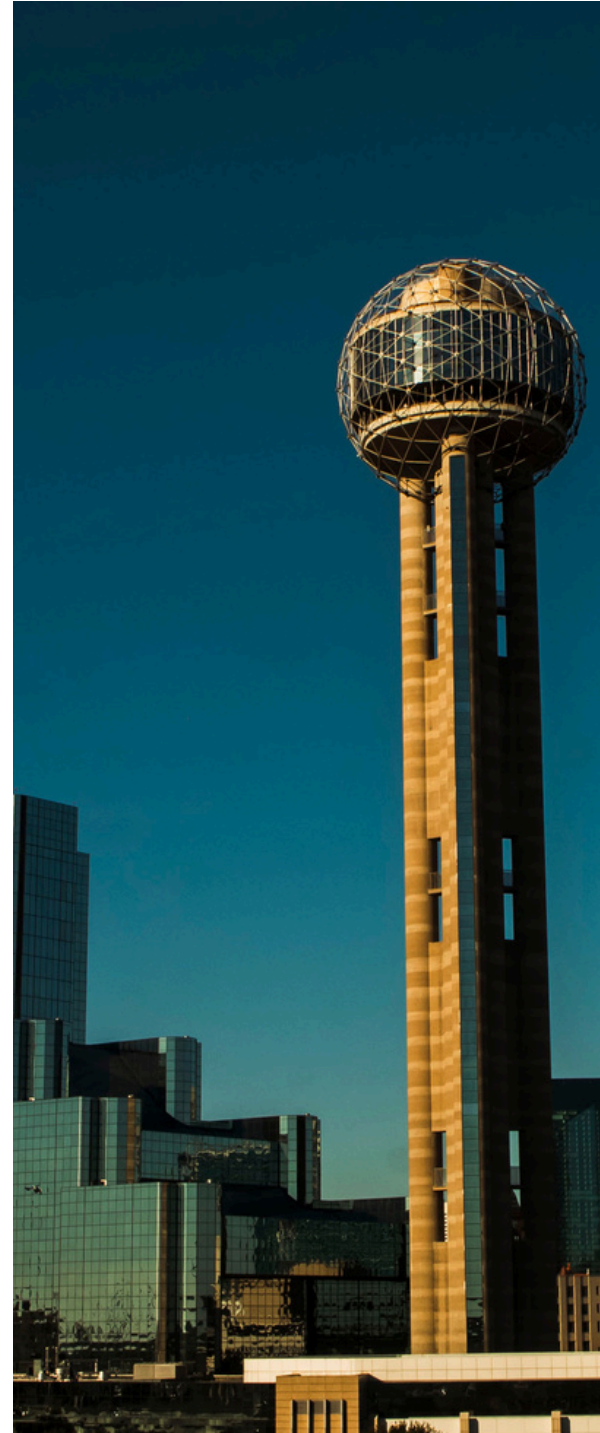
PERSONAL NET WORTH

SUPPORTING DOCUMENTS



ASSETS:

- **Worksheet 1: Cash & Cash Equivalents**
 - **Acceptable documentation:** Bank statements (checking/savings), CD statements, credit union statements
- **Worksheet 2: Investment Accounts & Securities**
 - **Acceptable documentation:** Most recent brokerage statements, stock portfolio summaries
- **Worksheet 3: Real Estate, excluding primary residence**
 - **Acceptable documentation:** Property tax assessments, appraisals, Zillow/market comps
- **Worksheet 4: Personal Property & Other Assets**
 - **Acceptable documentation:** Appraisals and insurance documents (jewelry, art, vehicles), Kelly Blue Book Value printout for vehicles
- **Worksheet 5: Ownership in Other Businesses**
 - **Acceptable documentation:** Operating agreement, stock certificates, K-1s, business tax returns
- **Worksheet 6: Life Insurance** (cash surrender value)
 - **Acceptable documentation:** Life insurance policy statements showing cash value
- **Worksheet 7: Amounts Owed to You**
 - **Acceptable documentation:** Promissory notes, executed loan agreements, and/or repayment schedules
- **Worksheet 8: Assets Held in Trust**
 - **Acceptable documentation:** Trust agreements
- **Worksheet 9: Transfers to Related Parties**
 - **Acceptable documentation:** Bank records, gift letters, asset transfer records, closing statements



Info@wbcsouthwest.org



817-299-0566



WBCsouthwest.org



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ASSETS CONTINUED:

LIABILITIES:

- **Worksheet 10: Mortgages** (excluding primary residence)
 - **Acceptable documentation:** Mortgage statements, loan amortization schedules
- **Worksheet 11: Loans on Life Insurance**
 - **Acceptable documentation:** Insurance loan statements
- **Worksheet 12: Other Liabilities**
 - **Acceptable documentation:** Credit card statements, personal loan statements, lines of credit, promissory notes

ADDITIONAL REQUIRED WORKSHEETS (EXCLUDED FROM PNW TOTAL):

- **Worksheet 13: Retirement Assets**
 - **Acceptable documentation:** 401(k), IRA, and/or pension statements
- **Worksheet 14: Primary Residence**
 - **Acceptable documentation:** Mortgage statement, county appraisal, property tax assessment



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