Net Worth Worksheet

THE NEWMAN GROUP
of Oppenheimer & Co. Inc.

Name:	**Date:**

Assets	
Checking Account(s)	
Savings Account(s)	
Employer Retirement Plan (401k, 403b, 457)	
IRAs (Traditional & Roth)	
Other Investments	
Primary Real Estate	
Other Real Estate	
Other:	
Other:	
Total	$ 0.00

Liabilities	
Mortgage	
Student Loans	
Car Loan	
Credit Card	
Other Debt:	
Other Debt:	
Total	$ 0.00

Net Worth	
Assets - Liabilities	$ 0.00

The information you provide in this worksheet will be used to review your current financial situation. The more complete and detailed the information you provide, the more valuable the review will be. The questionnaire requests information that we have found to be common to many of our clients, recognizing that all categories do not apply to all clients. The information supplied in response to this questionnaire is protected, privileged, and will be held in the strictest confidence. It will be used only in the formulation of recommendations of investment strategies to address your circumstances. It will not be revealed to anyone outside of the firm. Oppenheimer & Co. Inc. does not give legal or tax advice. However, our Financial Professional will work with clients, their attorneys and tax professionals to ensure all of their needs are met and properly executive.

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