

"Personal Financial Statement"

Name: _____
Home Address: _____
City, State, & Zip Code: _____
Phone: _____

Assets

Cash on Hand & in Banks _____ \$ _____
Savings Accounts _____ \$ _____
IRA or Other Retirement Accounts _____ \$ _____
Accounts, Loans and Notes Receivables _____ \$ _____
Residential Real Estate _____ \$ _____
Real Estate: Other _____ \$ _____
Life Insurance - Cash Surrender Value Only _____ \$ _____
Stocks and Bonds _____ \$ _____
Vehicles - Qty/Year/Make/Model _____ \$ _____
Personal Property: Other _____ \$ _____
Assets: Other _____ \$ _____

Liabilities

Accounts Payable _____ \$ _____
Notes Payable to Banks and Others _____ \$ _____
Installment Account Auto _____ \$ _____
Installment Account: Other _____ \$ _____
Loans Against Life Insurance _____ \$ _____
Unpaid Taxes _____ \$ _____
Credit Cards Payables _____ \$ _____
Residence Real Estate Loans _____ \$ _____
Real Estate Loans: Other _____ \$ _____
Liabilities: Other _____ \$ _____

NET WORTH (Assets minus Liabilities) _____ \$ _____

Sources of Income

Salary _____ \$ _____
Salary Spouse _____ \$ _____
Bonus and Commissions _____ \$ _____
Real Estate Income _____ \$ _____
Sources of Income: Other _____ \$ _____
TOTAL INCOME _____ \$ _____