

PERSONAL FINANCIAL STATEMENT

Name: _____

Date: _____

Assets	Amount in Dollars
Cash - checking accounts	\$ _____
Cash - savings accounts	\$ _____
Certificates of deposit	\$ _____
Securities - stocks / bonds / mutual funds	\$ _____
Notes & contracts receivable	\$ _____
Life insurance (<i>cash surrender value</i>)	\$ _____
Personal property (<i>autos, jewelry, etc.</i>)	\$ _____
Retirement Funds (<i>eg. IRAs, 401k</i>)	\$ _____
Real estate (<i>market value</i>)	\$ _____
Other assets (<i>specify</i>)	\$ _____
Other assets (<i>specify</i>)	\$ _____
Total Assets	\$ _____

Liabilities	Amount in Dollars
Current Debt (<i>Credit cards, Accounts</i>)	\$ _____
Notes payable (<i>describe below</i>)	\$ _____
Taxes payable	\$ _____
Real estate mortgages (<i>describe</i>)	\$ _____
Other liabilities (<i>specify</i>)	\$ _____
Other liabilities (<i>specify</i>)	\$ _____
Total Liabilities	\$ _____

Net Worth	\$ _____
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<p style="margin: 0;">Signature: _____</p> <p style="margin: 0; text-align: right;">Date: _____</p>
