

"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 _____ \$