

## Personal Financial Statement

Contact & General Information	Sources Of Income	Even Dollars
Name:	Salary:	
Street Address:	Commissions and Bonus:	
City:	Interest and Dividends:	
State & Zip Code:	Real Estate Income:	
Home Phone Number:		
Business Name:	Other Income: Itemized:	
Employer:		
Employer's Address:		
Position/Profession:		
Length of Time in Present Position:	<b>Total Income:</b>	
Have you ever filed for bankruptcy?		
State all trusts in which you possess a present or expectancy interest?		
<p>Are you relying on your own income &amp; assets for daily living expenses? If yes, list your annual income, total assets, and total liabilities.</p>	<p>Are you relying on the income &amp; assets of another for daily living expenses? If yes, list the income, assets &amp; liabilities of both you and the other person.</p>	

<b>Assets</b>		
	Total	% of Total
Checking and Savings Accounts		
Securities: Stocks, Mutual Funds (Market Value)		
Bonds: (Market Value)		
Retirement Accounts (401k, IRA's) (Market Value)		
Other Investments (Market Value)		
Real Estate (Market Value)		
Vehicle, Boat, Planes, Etc. (Market Value)		
Personal & Home Assets (Market Value)		
Other Assets (Market Value)		
<b>Total</b>		

<b>Liabilities</b>		
	Total	% of Total
Real Estate Loans/Mortgages Payable		
Vehicle, Boats, Planes, Etc. Loans Payable		
Credit Card Debt Payable		
Loans Payable on Personal/Home Assets		
Loans Payable to Banks or Credit Unions		
Other Liabilities or Debts Payable		
Unpaid Taxes or Liens Payable		
<b>Total</b>		
Net Worth		

<b>Assets</b>				
<b>Checking and Savings Accounts</b>				
Type of Account	Name of Account	Address of Institution	Date Account Opened	Current Balance
<b>Total</b>				

<b>Securities: Stocks, Mutual Funds (Market Value)</b>				
(Type Name of Stock, etc.)	Number of Shares	Purchase Date	Cost	Current Market Value
<b>Total</b>				

<b>Bonds: (Market Value)</b>				
(Type and Name of Bond)		Purchase Date	Cost	Current Market Value
<b>Total</b>				

<b>Retirement Accounts (401k, IRA's) (Market Value)</b>	
(Type and Name of Fund)	Current Market Value
<b>Total</b>	

<b>Other Investments (Market Value)</b>				
(Type of Investment)	Shares or % Ownership	Miscellaneous Description, If Needed	Cost	Current Market Value
<b>Total</b>				

<b>Real Estate (Market Value)</b>				
Describe Type of Property	Purchase Date	Original Cost	Current Balance Owning	Current Market Value
<b>Total</b>				

<b>Vehicle, Boats, Planes, Etc. Loans Payable</b>				
Description	Purchase Date	Original Cost	Current Balance Owing	Current Market Value
<b>Total</b>				

<b>Personal &amp; Home Assets (Market Value)</b>				
Description	Purchase Date (If Known)	Original Cost	Current Balance Owing	Current Market Value
<b>Total</b>				

<b>Business Interests (Market Value)</b>				
Description	Purchase Date (If Known)	Original Cost	Current Balance Owing	Current Market Value
<b>Total</b>				

<b>Other Assets (Market Value)</b>		
Description	Current Balance Owing	Current Market Value
<b>Total</b>		

<b>Liabilities</b>				
<b>Real Estate Loans/Mortgages Payable</b>				
Name of Loan or Mortgage Holder	Behind on Payments?	Interest Rate	Monthly Payment Amount	Current Balance Owing
<b>Total</b>				

<b>Vehicle, Boats, Planes, Etc. Loans Payable</b>				
Description	Behind on Payments?	Interest Rate	Current Market Value	Current Balance Owing
<b>Total</b>				

<b>Credit Card Debt Payable</b>				
Type of Card	Behind on Payments?	Interest Rate	Monthly Payment Amount	Current Balance Owing
<b>Total</b>				

<b>Loans Payable on Personal/Home Assets</b>				
Description	Purchase Date (If known)	Original Cost	Current Market Value	Current Balance Owing
<b>Total</b>				

<b>Loans Payable to Banks or Credit Unions</b>				
Name of Bank or Credit Union	Interest Rate	Payment Amount	Original Balance	Current Balance Owing
<b>Total</b>				

<b>Other Liabilities or Debts Payable</b>				
Name of Individual or Creditor	Interest Rate	Payment Amount	Original Balance	Current Balance Value
<b>Total</b>				

<b>Unpaid Taxes or Liens Payable</b>				
To Whom Payable	Type of Tax Lien	Against What Property	Due Date	Current Balance Owning
<b>Total</b>				

<b>Contingent Liabilities</b>		
Are you the co-signer on any loans or agreements?	Are you involved in any lawsuits or legal action?	Other Contingent Liabilities

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