

PERSONAL FINANCIAL STATEMENT

Name: _____

Date: _____

Assets	Amount in Dollars
Cash - checking accounts	
Cash - savings accounts	
Certificates of deposit (Fixed Deposits)	
Securities - stocks / bonds / mutual funds	
Notes & contracts receivable	
Life insurance <i>(cash surrender value)</i>	
Personal property <i>(autos, jewelry, etc.)</i>	
Pension Funds	
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 Details form)</i>	
Taxes payable	
Real estate mortgages <i>(describe on Details form)</i>	
Other liabilities <i>(specify)</i>	
Other liabilities <i>(specify)</i>	
Total Liabilities	
Net Worth	

Signature: _____	Date: _____
-------------------------	--------------------

