

## Personal Financial Statement

Name \_\_\_\_\_ Social Security # \_\_\_\_\_  
 Phone Number \_\_\_\_\_ Email \_\_\_\_\_  
 Street Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

**Assets & Liabilities**

<u>Assets</u>	<u>Amount</u>	<u>Liabilities</u>	<u>Amount</u>
Checking Accounts		Accounts Payable	
Savings Accounts		Notes Payable to Banks	
IRA/Retirement Accts.		Auto Loans	
Accounts Receivable		Other Installment Accts.	
Insurance Cash Surrender		Loans on Life Insurance	
Stocks & Bonds		Home Loan	
Home		Loans other Real Estate	
Other Real Estate		Unpaid Taxes	
Automobiles		Other Liabilities	
Other Personal Property		Other Liabilities	
Other Assets			
Other Assets		<b>Total Liabilities:</b>	
Other Assets			
<b>Total Assets:</b>		<b>Net Worth:</b>	

**Source of Income (Annual)**

Salary	\$
Dividends and Interest	\$
Bonus and Commissions	\$
Real Estate Income	\$
Other Income	\$

TOTAL INCOME \$ \_\_\_\_\_

**\*Please provide copies of bank statements evidencing available cash in bank accounts.**

*The undersigned certifies that this information was provided by him, is true, and correct.*

Printed Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_