

Personal Financial Statement

Name: _____

Address: _____

Phone: _____

Date: _____

Business Name: _____

Position/Title: _____

Assets

| Asset | Amount (\$) |
|---------------------------------------|--------------------|
| Cash (in bank, on hand) | _____ |
| Marketable Securities | _____ |
| Accounts & Notes Receivable | _____ |
| Life Insurance (cash surrender value) | _____ |
| Real Estate Owned | _____ |
| Automobiles | _____ |
| Retirement Accounts | _____ |
| Other Assets (describe) | _____ |
| Total Assets | _____ |

Liabilities

| Liability | Amount (\$) |
|----------------------------------|--------------------|
| Accounts Payable | _____ |
| Notes Payable to Bank | _____ |
| Installment Loans & Credit Cards | _____ |
| Mortgages on Real Estate | _____ |
| Unpaid Taxes | _____ |
| Other Liabilities (describe) | _____ |
| Total Liabilities | _____ |

Net Worth

Total Assets: _____

Less Total Liabilities: _____

Net Worth: _____

Sources of Income

| Source | Annual Amount (\$) |
|----------------------------|---------------------------|
| Salary | _____ |
| Dividends & Interest | _____ |
| Rental Income | _____ |
| Other Income (describe) | _____ |
| Total Annual Income | _____ |

Other Information

Contingent Liabilities (as endorser, co-maker, etc.): _____

Alimony/Child Support (obligation): _____

Other special debts or obligations: _____

Signature: _____

Date: _____