

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: _____