

Wealth Statement (Individual)

Personal Information

Full Name

Date of Birth

Residential Address

Occupation

Assets

Description	Value	Remarks
Cash in Bank		
Investments (Stocks, Bonds, etc.)		
Real Estate		
Vehicles		
Jewelry/Valuables		
Other Assets		

Liabilities

Description	Amount Owed	Remarks
Loans (Personal, Mortgage, etc.)		
Credit Card Balances		
Other Liabilities		

Net Worth Summary

Total Assets

Total Liabilities

Net Worth (Assets - Liabilities)

Declaration

I hereby declare that the information provided above is true and correct to the best of my knowledge.

Date

Signature