

# Client Financial Statement

## Client Information

Name	<hr/>
Address	<hr/>
Phone	<hr/>
Email	<hr/>
Date of Statement	<hr/>

## Assets

Description	Value
Cash	<hr/>
Checking Accounts	<hr/>
Savings Accounts	<hr/>
Investments	<hr/>
Real Estate	<hr/>
Other Assets	<hr/>
<b>Total Assets</b>	<hr/>

## Liabilities

Description	Amount
Credit Card Debt	<hr/>
Loan(s)	<hr/>
Mortgage	<hr/>
Other Liabilities	<hr/>
<b>Total Liabilities</b>	<hr/>

## Net Worth

Calculation	Amount
-------------	--------

---

Total Assets – Total Liabilities

---

## Income

Source	Amount (per month)
--------	--------------------

---

Salary	
--------	--

---

Business/Other Income	
-----------------------	--

---

Investment Income	
-------------------	--

---

Other	
-------	--

---

<b>Total Income</b>	
---------------------	--

---

## Expenses

Type	Amount (per month)
------	--------------------

---

Housing	
---------	--

---

Utilities	
-----------	--

---

Food	
------	--

---

Transportation	
----------------	--

---

Insurance	
-----------	--

---

Loan Payments	
---------------	--

---

Other Expenses	
----------------	--

---

<b>Total Expenses</b>	
-----------------------	--

---

## Additional Notes

---

Signature: \_\_\_\_\_ Date: \_\_\_\_\_