



PERSONAL FINANCIAL STATEMENT

Name _____
 Street Address _____
 City _____ State _____ Zip _____

ASSETS

Cash in Banks	
Marketable Securities	
Pension, 401k, IRA and Other Retirement Funds	
Accounts, Loans, and Notes Receivable	
Cash Surrender Value of Life Insurance	
Net Worth of Business Owned	
Real Estate	
Automobiles: Number ()	
Household Furnishings and Personal Effects	
Other Assets (itemize)	

TOTAL ASSETS

LIABILITIES AND NET WORTH

Credit Card and Installment Debt	
Notes Payable	
Mortgages Payable	
Other Liabilites (itemize)	

TOTAL LIABILITIES

NET WORTH

SOURCE OF INCOME

Salary	
Dividends and Interest	
Bonus and Commissions	
Income from Real Estate	
Other Income	

TOTAL INCOME

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

Signature: _____

Date: _____

Home Phone: _____