

Personal Financial Statement

Name:	Name:
<u>Assets</u> Amount in \$	<u>Assets</u> Amount in \$
Cash – Checking:	Cash – Checking:
Cash – Savings:	Cash – Savings:
Securities:	Securities:
Notes Receivable:	Notes Receivable:
Life Insurance (Cash Value):	Life Insurance (Cash Value):
Retirement Fund:	Retirement Fund:
Real Estate Value:	Real Estate Value:
Other Assets:	Other Assets:
Total Assets:	Total Assets:
<u>Liabilities</u>	<u>Liabilities</u>
Current Debt:	Current Debt:
Note Payable:	Note Payable:
Real Estate Mortgages:	Real Estate Mortgages:
Other Liabilities:	Other Liabilities:
Total Liabilities:	Total Liabilities:
<u>Net Worth</u>	<u>Net Worth</u>
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<u>Sources of Income</u>	<u>Sources of Income</u>
Employment Information	Employment Information
Salary	Salary
Bonus & Commissions	Bonus & Commissions
Real Estate Income	Real Estate Income
Other Income	Other Income
Total Income	Total Income

Date:

Date:

Signature:

Signature: