

Personal Financial Statement

Name _____ Social Security # _____

Phone Number _____ Email _____

Street Address _____

City _____ State _____ Zip Code _____

Assets & Liabilities

Assets	Amount	Liabilities	Amount
Checking Accounts		Accounts Payable	
Savings Accounts		Notes Payable to Banks	
IRA/Retirement Accts.		Auto Loans	
Accounts Receivable		Other Installment Accts.	
Insurance Cash Surrender		Loans on Life Insurance	
Stocks & Bonds		Home Loan	
Home		Loans other Real Estate	
Other Real Estate		Unpaid Taxes	
Automobiles		Other Liabilities	
Other Personal Property		Other Liabilities	
Other Assets			
Other Assets		Total Liabilities:	
Other Assets			
Total Assets:		Net Worth:	

Source of Income (Annual)

Salary	\$
Dividends and Interest	\$
Bonus and Commissions	\$
Real Estate Income	\$
Other Income	\$

TOTAL INCOME \$ _____

***Please provide copies of bank statements evidencing available cash in bank accounts.**

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

Printed Name _____ Signature _____ Date _____