

Personal Financial Statement

Date: _____

ASSETS

Cash on hand/ Checking Account _____

Stocks and Bonds _____

Cash value of life insurance _____

Home _____

Other Real Estate _____

Mortgages / Notes Receivable _____

Business valuation _____

Automobiles / Vehicles _____

Furniture / Computer Equipment _____

Jewelry _____

Other Personal Property _____

IRA / Pension / Retirement Plan _____

Other Assets _____

Total Assets _____

DEBTS

Credit card debt _____

Automobile loans _____

Home Mortgage _____

Other real estate mortgages _____

Student loans _____

Business loans _____

Medical bills _____

Bank loans _____

Other past due bills _____

Other debts and loans _____

Total Debts _____

Net Worth (assets minus debts) _____