

Personal Financial Statement

NAME	AS OF DATE
ASSETS	
Cash, Checking, Savings, Money Market, Time Deposits	
Cash Value of Life Insurance	
Stocks and Bonds (Publicly traded, listed)	
Stocks and Bonds (Not publicly traded, listed)	
Accounts and Notes Receivable	
Mortgage and Contracts for Deeds Owned	
Annuities	
Retirement Accounts	
Closely Held Business Interests	
Real Estate-Homestead	
Real Estate-Other	
Real Estate-Time Shares	
Oil and Gas	
Automobiles	
Personal Property	
Other Assets	
Assets Held Outside the U.S.	
TOTAL ASSETS:	
LIABILITIES	
Installment Loans Payable to Institutions	
Installment Loans Payable to Individuals	
Credit Card Debt	
Lines of Credit	
Income Taxes Payable	
Other Taxes Payable	
Mortgage on Homestead-1 st Lien	
Mortgage on Homestead-2 nd Lien	
Mortgages or Liens on Other Real Estate	
Contracts for Deed	
Other Liabilities-Partnerships	
Other Liabilities-Closely Held Businesses	
Other Liabilities	
Total Liabilities	
Net Worth	

Personal Financial Statement

INCOME	
Personal Income	
Wages, Salary	
Pensions and Annuities	
Social Security Benefits	
Other (Specify) Trust Income	
Other (Specify)	
Total Personal Income	
Business/Real Estate Income	
Sales/Rent Revenue	
Operating Expenses	
Other Income (Specify) Sale of Assets	
Other Expenses (Specify) Uninsured Losses	
Total Business Income	
Total Income	

LIST UNUSUAL PERSONAL EXPENSES BELOW

Signature:

Date: