



## Personal Financial Statement

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State & Zip Code: \_\_\_\_\_

Home Phone \_\_\_\_\_

Assets	In Even Dollars	Liabilities and Net Worth	In Even Dollars
Cash on hand and in Banks	\$	Notes or Loans Payable: Total From Schedule A	\$
Stocks and Bonds-Total From Schedule B		Real Estate Mortgages Payable Total From Schedule C	
Real Estate Owned-Total From Schedule C		Unpaid Taxes: Total From Schedule D	
Cash Value Life Insurance—Total Schedule E		Life Insurance Loans- Total From Sched. E	
IRA or Other Retirement Accounts—Total From Schedule F		Other Liabilities: Total From Schedule G	
Other Assets: Itemize on Separate Sheet			
<b>TOTAL ASSETS</b>	<b>\$</b>	<b>TOTAL LIABILITIES</b>	<b>\$</b>
		<b>NET WORTH</b>	<b>\$</b>

Sources of Income	In Even Dollars	General Information
Salary	\$	Employer
Bonus and Commissions		Position / Profession
Dividends		Employer's Address
Real Estate Income		Years at Position or Profession
*Other Income: Itemize		Phone Number of Business
<b>TOTAL</b>	<b>\$</b>	Partner, officer or owner in any other venture? If so, explain:
*Alimony or child support need not be disclosed unless relied upon as a basis for extension of credit.		Are you current with filing your income taxes?

Contingent Liabilities	In Even Dollars	General Information (continued)
As endorser, co-maker or guarantor	\$	Are you a defendant in any suits or legal action?
On leases		Have you ever filed bankruptcy?
Legal claims		Do you have a will?
Other special debt (explain)		Do you have a trust?
<b>TOTAL</b>	<b>\$</b>	Number of dependents (Ages)

**Schedule A: Banks, Finance Companies, Credit Unions and Others.**

Names of all the institutions and others at which you have outstanding loans or notes payable.

<i>Name and Address of Institution or Person</i>	<i>Original Balance</i>	<i>Current Amount owing</i>	<i>Payment Amount</i>	<i>Frequency of Payments</i>	<i>If Secured, Type of Collateral</i>
<b>TOTAL</b>					

**Schedule B: Stocks and Bonds (Attach additional sheets if necessary)**

<i>Number of Shares</i>	<i>Name of Securities</i>	<i>Cost</i>	<i>Current Market Value</i>	<i>Total Value</i>
<b>TOTAL</b>				

**Schedule C: Real Estate Owned (Attach additional sheets if necessary)**

	<i>Property # 1</i>	<i>Property # 2</i>	<i>Property # 3</i>
Name & Address of Mortgage Holder			
Address of Property			
Type of Property			
Date Purchased			
Mortgage Balance			
Monthly Payment			
Original Cost			
Current Market Value			

**Schedule D: Unpaid Taxes.** Describe the type, to whom payable, amount, and when due.

<i>Name of Institution</i>	<i>Type of Tax</i>	<i>Amount Owed</i>
<b>TOTAL</b>		

**Schedule E: Life Insurance Carried**

