

PERSONAL FINANCIAL STATEMENT
(use additional pages if needed)

Name: _____

Name (if jointly held assets/liabilities): _____

ASSETS:

Bank Accounts	Bank Name	Amount
	_____	_____
	_____	_____
	_____	_____
	_____	_____

Investments (Stocks/Bonds/Money Market/Partnerships/etc)	Issuer (company) name	Amount
	_____	_____
	_____	_____
	_____	_____
	_____	_____

Retirement Accounts	_____	_____
	_____	_____

Real Estates	Location	Market Value
	_____	_____
	_____	_____
	_____	_____

Vehicles	Year/Model	Market Value
	_____	_____
	_____	_____
	_____	_____
	_____	_____

Other Assets	_____	_____
	_____	_____
	_____	_____

TOTAL ASSETS: _____ A

LIABILITIES:

Credit Cards

Names

Amount

Loans

Lender

Amount

Student Loans

Lender

Amount

Real Estate Mortgages

Lender

Amount

Tax Liens/Judgements

Other Liabilities

TOTAL LIABILITIES:

_____ B

Equity (A-B)=C

(Note: A=B+C)

I attest that this is a true and accurate reflection of my financial condition as of this date.

Signed: _____

Date: _____

Signed: _____

Date: _____