

PERSONAL FINANCIAL STATEMENT

Assets

Amount in Dollars

Cash - checking accounts	\$	-
Cash - savings accounts		-
Certificates of deposit		-
Securities - stocks / bonds / mutual funds		-
Notes & contracts receivable		-
Life insurance (<i>cash surrender value</i>)		-
Personal property (<i>autos, jewelry, etc.</i>)		-
Retirement Funds (<i>eg. IRAs, 401k</i>)		-
Real estate (<i>market value</i>)		-
Other assets (<i>specify</i>)		-
Other assets (<i>specify</i>)		-
Total Assets	\$	-

Liabilities**Amount in Dollars**

Current Debt (<i>Credit cards, Accounts</i>)	\$ -
Notes payable (<i>describe below</i>)	-
Taxes payable	-
Real estate mortgages (<i>describe</i>)	-
Other liabilities (<i>specify</i>)	-
Other liabilities (<i>specify</i>)	-
Total Liabilities	\$ -
Net Worth	\$ -
Name:	Date:

Details**ASSETS - Details*****Notes and contracts held***

From Whom Owing	Original Amount	Original Date	Monthly Payment	Maturity Date	History / Purpose	Balance Owing
	\$ -		\$ -			\$ -
Total						-

Securities: stocks / bonds / mutual funds

Name of Security	Number of Shares	Cost	Date of Acquisition	Market Value
		\$ -		\$ -
Total				-

Stock in privately held companies

Company Name	No. of shares	\$ Invested	Est. Market Value
		\$ -	\$ -
Total			-

Real Estate

Description / Location	Amount Owning	Original Cost	Purchase Date	Market Value
	\$ -	\$ -		\$ -
Total				-

LIABILITIES

Credit card & charge card debt

Name of Card / Creditor	Amount Due
	\$ -
Total	-

Notes payable (excluding monthly bills)

Name of Creditor	Original Amount	Monthly Payment	Interest Rate	Secured by (Leine)	Amount Owning
	\$ -	\$ -			\$ -
Total					-

Mortgage / real estate loans payable

Name of Creditor	Original Amount	Monthly Payment	Interest Rate	Secured by (Leine)	Amount Owing
	\$ -	\$ -			\$ -
Total					-