



**Personal Financial Statement**

Name: \_\_\_\_\_ SSN: \_\_\_\_\_  
 Home Address: \_\_\_\_\_ Home Phone: \_\_\_\_\_  
 City, ST, Zip: \_\_\_\_\_ Business Phone: \_\_\_\_\_

**Assets**

Cash in Bank Accounts	
Accounts/Notes Receivable	
Stocks/Bonds/Mutual Funds	
Real Estate (Market Value)	
Real Estate (Market Value)	
Automobiles Owned	
Equipment Owned	
Other Assets (Itemize):	
<b>Total Assets</b>	

**Liabilities**

Notes Payable to Banks	
Accounts Payable	
Credit Card Debt	
Mortgage(s)	
2 <sup>nd</sup> Mortgage(s)	
Automobile Loans	
Equipment Debt	
Other Liabilities (Itemize):	
<b>Total Liabilities</b>	

<b>NET WORTH</b> (Subtract your total liabilities from total assets)	
--	--

**Income Information**

Salary	
Bonus and Commissions	
Dividends	
Real Estate Income	
Other (Child Support, Alimony)	
<b>TOTAL INCOME</b>	

**Contingent Liabilities**

<b>TOTAL CONTINGENTS</b>	

<b>ADDITIONAL INFORMATION</b>	

\_\_\_\_\_  
 Signature of Person Making Statement

\_\_\_\_\_  
 Date Statement Signed

Please Fax To: 503-431-2077