



PERSONAL FINANCIAL STATEMENT

Date:

Assets (Present Market Value)

Amount

Cash On Hand/Checking Account	\$	
Savings	\$	
Stocks and Bonds	\$	
Cash Value of Life Insurance	\$	
Coins	\$	
Home	\$	
Other Real Estate	\$	
Mortgages/Notes Receivable	\$	
Business Valuation	\$	
Automobiles	\$	
Furniture	\$	
Jewelry	\$	
Other Personal Property	\$	
Pension/Retirement	\$	
Other Assets	\$	

Total Assets: \$

Liabilities (Current Amount Owed)

Amount

Credit Card Debt	\$	
Automobile Loans	\$	
Home Mortgages	\$	
Personal Debt To Relatives	\$	
Business Loans	\$	
Educational Loans	\$	
Medical/Other Past Due Bills	\$	
Life Insurance Loans	\$	
Bank Loans	\$	
Other Debts and Loans	\$	

Total Liabilities: \$

NET WORTH (Total assets minus total liabilities) \$