Personal Financial Statement of: _____

As of: mm/dd/yyyy _____

ASSETS	
CHECKING ACCOUNTS	$ _____
Bank name	$
Bank name	$
SAVINGS ACCOUNTS	$ _____
Bank name	$
Bank name	$
RETIREMENT ACCOUNTS	$ _____
401(k), 403(b), IRA, pension	$
IRA broker name	$
INVESTMENT ACCOUNTS	$ _____
Broker name	$
Broker name	$
REAL ESTATE	$ _____
Primary residence address	$
Additional property address	$
AUTO, BOAT, RV	$ _____
Name & mileage	$
Name & mileage	$
PRIVATE BUSINESS INTEREST	$ _____
Name of business	$
OTHER	$ _____
Name of property (insurance, valuable)	$
Name of property (insurance, valuable)	$
Name of property (insurance, valuable)	$

LIABILITIES	
CREDIT CARDS	$ _____
Credit card name	$
Credit card name	$
HOME LOANS	$ _____
Mortgage bank name	$
HELOC bank name	$
STUDENT LOANS	$ _____
Subsidized	$
Non-subsidized	$
AUTO, BOAT, RV LOANS	$ _____
Auto loan bank name	$
Boat or RV loan lender	$
NOTES PAYABLE	$ _____
Note payable (lender)	$
Note payable (lender)	$
OTHER OBLIGATIONS	$ _____
Other obligation	$
Other obligation	$

TOTAL ASSETS	$ _____
TOTAL LIABILITIES	$ _____

NET WORTH Total assets - total liabilities $ _____

Signature: _____ **Date:** _____

I certify that the information above is true and complete to the best of my knowledge.

Enter the most recent balance of each account at current market value. Add a line for every extra account.