
PERSONAL FINANCIAL STATEMENT

Prepared for _____

on _____

NAME: _____
ADDRESS: _____
_____, _____

HOME PHONE: _____
CELL PHONE: _____
SSN: _____
BIRTHDATE: _____

DETAILED SUMMARY LISTING OF ASSETS

INDIVIDUAL ASSET INFORMATION

AMOUNT

Accounts Receivable:	
Annuity:	
Boats:	
Bonds	
Business Property and Real Estate:	
Certificate of Deposit:	
Checking Accounts:	
Household Furnishings:	
Jewelry:	
Life Insurance:	
Mutual Funds:	
Notes Receivable:	
Other Assets:	
Other Real Estate:	
Personal Residence Real Estate:	
Recreational Equipment:	
Retirement Plans:	
Savings Accounts:	
Stocks:	
Trusts:	
Vehicles	

INDIVIDUAL TOTAL ASSET VALUE:

\$0.00

DETAILED SUMMARY LISTING OF LIABILITIES

INDIVIDUAL LIABILITY INFORMATION

AMOUNT

Mortgage or Rent:	
Home Equity Loan:	
Other Mortgage:	
Vehicle Loans:	
Credit Cards:	
Student Loans:	
Other Liabilities:	

INDIVIDUAL TOTAL LIABILITIES:

\$0.00

DETAILED SUMMARY LIST OF MONTHLY INCOME ASSET

INDIVIDUAL MONTHLY INCOME

MONTHLY AMOUNT

Monthly Salary or Wages:	
Investment Accounts:	
Alimony:	
Child Support:	
Trusts:	
Other Income Sources:	

INDIVIDUAL TOTAL MONTHLY INCOME ASSET:

\$0.00

DETAILED SUMMARY LIST OF MONTHLY EXPENSE LIABILITY

INDIVIDUAL MONTHLY EXPENSES

MONTHLY AMOUNT

Paid Alimony:	
Paid Child Care:	
Paid Child Support:	
Groceries:	
Healthcare or Medications:	
Housing or Rent:	
Other Mortgage Loans:	
Auto Loans:	
Auto Insurance:	
Health or Dental Insurance:	
Life Insurance:	
Other Insurance:	

Credit Cards:	
Student Loans:	
Other Expenses:	

INDIVIDUAL TOTAL MONTHLY EXPENSE LIABILITY: \$0.00

NET WORTH SUMMARY

TOTAL ASSETS:	\$0.00
TOTAL LIABILITIES:	\$0.00
TOTAL NET WORTH:	\$0.00

I, _____, hereby certify and warrant, to the best of my knowledge, that the
aforementioned information contained within this Personal Financial Statement is true, accurate and complete.

_____ DATED: _____
