

PERSONAL FINANCIAL STATEMENT

ASSETS

Cash - checking accounts

Institution	Account No.	Value	Ownership

Cash - savings accounts

Institution	Account No.	Value	Ownership

Certificates of deposit

Institution	Account No.	Value	Ownership

Securities - stocks / bonds / mutual funds

Institution	Account No.	Value	Ownership

Notes & contracts receivable

Maker	Account No.	Value	Ownership

Life insurance

Institution	Account No.	Death Benefit	Beneficiary

Personal property (*autos, jewelry, etc.*)

Type	Value	Ownership

Retirement Funds (*eg. IRAs, 401k*)

Institution	Account No.	Death Benefit	Beneficiary

PERSONAL FINANCIAL STATEMENT

Real estate (market value)

Location	Value	Ownership

Other assets (specify)

Type	Value	Ownership

Total Assets

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LIABILITIES

Current Debt (Credit cards, Accounts)

Institution	Account No.	Amount	

Notes payable (describe below)

Payee	Amount	

Taxes payable

Payee	Amount	

Real estate mortgages (describe)

Institution	Account No.	Amount	

Other liabilities (specify)

Institution	Amount	

Total Liabilities

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NET WORTH

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

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