

## PERSONAL FINANCIAL STATEMENT

1 DATE

2 NAME

SPOUSE

3 RESIDENCE ADDRESS

### ASSETS

4 Cash in Bank

5 Certificates of Deposit

6 Marketable Securities (Stocks, Bonds, etc.)

7 Ownership in Private Businesses

8 Primary Residence

9 Other Residences (Attach List)

10 Real Estate Investments (Attach List by Property)

11 Automobiles Owned (Attach List)

12 Retirement Accounts (401k, IRA, etc.)

13 Loans Due from Others

14 Total Assets

Total lines 4 through 13

### LIABILITIES

15 Mortgages on Primary Residence

16 Mortgages on Other Residences

17 Credit Card Balances

18 Personal Loans

19 Auto Loans

20 Business Loans

21 Student Loans

22 Mortgages on Real Estate Investments

23 Other Loans/Debts

24 Total Liabilities

Total lines 15 through 23

25 Net Worth

Subtract line 24 from line 14

### INCOME

26 Salaries and Wages

27 Bonuses and Commissions

28 Interest and Dividends

29 Real Estate Income

30 Other Business Income

31 Pension or Annuity Income

32 Social Security or SSDI Income

33 Other Government Assistance

34 Alimony or other Family Support

35 Total Income

Total lines 26 through 34