

Personal Financial Statement as of: _____

| Assets | Individual | Joint | Total |
|--|-------------------|--------------|--------------|
| Cash & Savings Accounts | | | |
| Certificates of Deposit | | | |
| Stocks | | | |
| Bonds | | | |
| Mutual Funds | | | |
| Unlisted Securities | | | |
| IRA, 401(k), 403(b) – (Retirement Accts) | | | |
| Annuities | | | |
| Cash Value Life Insurance | | | |
| Loans to Others - Total including page 3 | | | |
| Real Estate – Total including page 3 | | | |
| Trust Fund | | | |
| Personal Property - Total including page 3 | | | |
| Automobiles - Total including page 3 | | | |
| Furniture | | | |
| Jewelry | | | |
| Other Assets | | | |
| Total Assets | | | |

| Liabilities | Individual | Joint | Total |
|--|-------------------|--------------|--------------|
| Mortgage | | | |
| HELOC – Home Equity Line of Credit | | | |
| Bank Loan – Secured with Collateral (Auto) | | | |
| Bank Loan – Unsecured/Signature Loan | | | |
| Student Loans | | | |
| Other Loans | | | |
| Credit Cards | | | |
| Alimony/Child Support | | | |
| 401(k) or 403(b) Loan | | | |
| IRS or State Income Taxes | | | |
| Payday Loan(s) | | | |
| Other Debts | | | |
| Miscellaneous | | | |
| Total Liabilities | | | |

ASSETS – LIABILITIES = NET WORTH

| Other Miscellaneous Assets (i.e. Loans to Other People, Mortgages and Unlisted Securities) | | | |
|---|---------------------------------|-----------------------------|--------------|
| Held in names of | Description, including maturity | Cost | Market Value |
| | | | |
| | | | |
| | | | |
| Real Estate Owned | | | |
| Title in names of | Description & Location | Mortgage | Market Value |
| | | | |
| | | | |
| | | | |
| Personal Property and Vehicles | | | |
| Owners | Description & Location | Loan | Market Value |
| | | | |
| | | | |
| | | | |
| Loans to Relatives | | | |
| Owners | Debtor | Current Balance Outstanding | |
| | | | |
| | | | |