

# PERSONAL FINANCIAL STATEMENT

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Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City/State/Zip Code: \_\_\_\_\_

## Assets

Cash on Hand and in Banks	\$
U.S. Government Securities	\$
Account, Loans and Notes Receivable	\$
Cash surrender Value of Life Insurance	\$
Value of Businesses owned	\$
Other Stocks and Bonds	\$
Real Estate	\$
Automobile - Number ( )	\$
Household Furnishings and Personal Effects	\$
Other Assets (Itemize)	\$

**Total Assets** \$ \_\_\_\_\_

## Liabilities and Net Worth

Notes Payable	\$
Liens on Real Estate	\$
Other Liabilities (Itemize)	\$

**Total Liabilities** \$ \_\_\_\_\_

**Net Worth** \$ \_\_\_\_\_

## Source of Income

Salary	\$
Bonus and Commissions	\$
Dividends and Interest	\$
Real Estate Income	\$
Other Income	\$

**Total Income** \$ \_\_\_\_\_

The undersigned certifies that this information was provided by him/her and is true and correct.

Signature: \_\_\_\_\_ Print Name: \_\_\_\_\_

Date: \_\_\_\_\_ Phone: \_\_\_\_\_