

Personal Financial Statement

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Name

Date

Address

Phone

<u>Assets</u>	<u>Amount</u>
Cash - check accounts	\$ -
Cash - savings accounts	-
Certificates of deposit	-
Securities - stocks / bonds / mutual funds	-
Notes & contracts receivable	-
Life insurance (cash surrender value)	-
Personal property (autos, jewellery, etc.)	-
Retirement Funds (eg. IRAs, 401k)	-
Real Estate (market value)	-
Other assets (specify)	-
Other assets (specify)	-
Total Assets	\$ -
<u>Liabilities</u>	<u>Amount</u>
Current Debt (Credit cards, Accounts)	\$ -
Notes payable (describe next tab)	-
Taxes payable	-
Property mortgages (describe next tab)	-
Other liabilities (specify)	-
Other liabilities (specify)	-
Total Liabilities	\$ -
Net Worth	\$ -

Signature: **Date:**