

# PERSONAL FINANCIAL STATEMENT

1 DATE

2 NAME  SPOUSE

3 RESIDENCE ADDRESS

## ASSETS

4	Cash in Bank	<input type="text"/>
5	Certificates of Deposit	<input type="text"/>
6	Marketable Securities (Stocks, Bonds, etc.)	<input type="text"/>
7	Ownership in Private Businesses	<input type="text"/>
8	Primary Residence	<input type="text"/>
9	Other Residences (Attach List)	<input type="text"/>
10	Real Estate Investments (Attach List by Property)	<input type="text"/>
11	Automobiles Owned (Attach List)	<input type="text"/>
12	Retirement Accounts (401k, IRA, etc.)	<input type="text"/>
13	Loans Due from Others	<input type="text"/>
14	Total Assets	<input type="text"/> <i>Total lines 4 through 13</i>

## LIABILITIES

15	Mortgages on Primary Residence	<input type="text"/>
16	Mortgages on Other Residences	<input type="text"/>
17	Credit Card Balances	<input type="text"/>
18	Personal Loans	<input type="text"/>
19	Auto Loans	<input type="text"/>
20	Business Loans	<input type="text"/>
21	Student Loans	<input type="text"/>
22	Mortgages on Real Estate Investments	<input type="text"/>
23	Other Loans/Debts	<input type="text"/>
24	Total Liabilities	<input type="text"/> <i>Total lines 15 through 23</i>
25	Net Worth	<input type="text"/> <i>Subtract line 24 from line 14</i>

## INCOME

26	Salaries and Wages	<input type="text"/>
27	Bonuses and Commissions	<input type="text"/>
28	Interest and Dividends	<input type="text"/>
29	Real Estate Income	<input type="text"/>
30	Other Business Income	<input type="text"/>
31	Pension or Annuity Income	<input type="text"/>
32	Social Security or SSDI Income	<input type="text"/>
33	Other Government Assistance	<input type="text"/>
34	Alimony or other Family Support	<input type="text"/>
35	Total Income	<input type="text"/> <i>Total lines 26 through 34</i>