

PERSONAL FINANCIAL STATEMENT

Date ____ \ ____ \ ____

Assets (Present market value)

| | |
|-------------------------------|----------|
| Cash on hand/Checking account | \$ _____ |
| Savings | \$ _____ |
| Stocks and bonds | \$ _____ |
| Cash value of life insurance | \$ _____ |
| Coins | \$ _____ |
| Home | \$ _____ |
| Other real estate | \$ _____ |
| Mortgages/Notes receivable | \$ _____ |
| Business valuation | \$ _____ |
| Automobiles | \$ _____ |
| Furniture | \$ _____ |
| Jewelry | \$ _____ |
| Other personal property | \$ _____ |
| Pension/Retirement | \$ _____ |
| Other assets | \$ _____ |

Total Assets \$

Liabilities (Current amount owed)

| | |
|------------------------------|----------|
| Credit card debt | \$ _____ |
| Automobile loans | \$ _____ |
| Home mortgages | \$ _____ |
| Personal debt to relatives | \$ _____ |
| Business loans | \$ _____ |
| Educational loans | \$ _____ |
| Medical/Other past due bills | \$ _____ |
| Life insurance loans | \$ _____ |
| Bank loans | \$ _____ |
| Other debts and loans | \$ _____ |

Total Liabilities \$

Net Worth (Total assets minus total liabilities) \$