**PERSONAL FINANCIAL STATEMENT**

**Prepared for**

**on**

|  |  |
| --- | --- |
| **NAME:** |  |
| **ADDRESS:** |  |
|   | ,  |
| **HOME PHONE:** |  |
| **CELL PHONE:** |  |
| **SSN:** |   |
| **BIRTHDATE:** |  |

***DETAILED SUMMARY LISTING OF ASSETS***

|  |  |
| --- | --- |
| **INDIVIDUAL ASSET INFORMATION**  | **AMOUNT** |
| Accounts Receivable: |  |
| Annuity: |  |
| Boats: |  |
| Bonds |  |
| Business Property and Real Estate: |  |
| Certificate of Deposit: |  |
| Checking Accounts: |  |
| Household Furnishings: |  |
| Jewelry: |  |
| Life Insurance: |  |
| Mutual Funds: |  |
| Notes Receivable: |  |
| Other Assets: |  |
| Other Real Estate: |  |
| Personal Residence Real Estate: |  |
| Recreational Equipment: |  |
| Retirement Plans: |  |
| Savings Accounts: |  |
| Stocks: |  |
| Trusts: |  |
| Vehicles |  |
|   |   |
| **INDIVIDUAL TOTAL ASSET VALUE:** | **$0.00** |

***DETAILED SUMMARY LISTING OF LIABILITIES***

|  |  |
| --- | --- |
| **INDIVIDUAL LIABILITY INFORMATION**   | **AMOUNT** |
| Mortgage or Rent: |  |
| Home Equity Loan: |  |
| Other Mortgage: |  |
| Vehicle Loans: |  |
| Credit Cards: |  |
| Student Loans: |  |
| Other Liabilities: |  |
|   |   |
| **INDIVIDUAL TOTAL LIABILITIES:** | **$0.00** |

***DETAILED SUMMARY LIST OF MONTHLY INCOME ASSET***

|  |  |
| --- | --- |
| **INDIVIDUAL MONTHLY INCOME**   | **MONTHLY AMOUNT** |
| Monthly Salary or Wages: |  |
| Investment Accounts: |  |
| Alimony: |  |
| Child Support: |  |
| Trusts: |  |
| Other Income Sources: |  |
|   |   |
| **INDIVIDUAL TOTAL MONTHLY INCOME ASSET:** | **$0.00** |

***DETAILED SUMMARY LIST OF MONTHLY EXPENSE LIABILITY***

|  |  |
| --- | --- |
| **INDIVIDUAL MONTHLY EXPENSES**  | **MONTHLY AMOUNT** |
| Paid Alimony: |  |
| Paid Child Care: |  |
| Paid Child Support: |  |
| Groceries: |  |
| Healthcare or Medications: |  |
| Housing or Rent: |  |
| Other Mortgage Loans: |  |
| Auto Loans: |  |
| Auto Insurance: |  |
| Health or Dental Insurance: |  |
| Life Insurance: |  |
| Other Insurance: |  |
| Credit Cards: |  |
| Student Loans: |  |
| Other Expenses: |  |
|   |   |
| **INDIVIDUAL TOTAL MONTHLY EXPENSE LIABILITY:** | **$0.00** |

***NET WORTH SUMMARY***

|  |  |
| --- | --- |
| TOTAL ASSETS: | $0.00 |
| TOTAL LIABILITIES: | $0.00 |
| **TOTAL NET WORTH:** | **$0.00** |

I, , hereby certify and warrant, to the best of my knowledge, that the aforementioned information contained within this Personal Financial Statement is true, accurate and complete.

|  |  |  |
| --- | --- | --- |
|   |   | DATED:  |
|  |   |   |

individual\_or\_married=married:show

individual\_or\_married=married:show

individual\_or\_married=married:show

employed=yes:show

individual\_or\_married=married:show

individual\_or\_married=married:show

individual\_or\_married=married:show