**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 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:** |  |

**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.

|  |  |  |
| --- | --- | --- |
| **SIGNATURE** |  | **DATED:** |