

Personal Financial Statement

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Name:	Date:	Name:	Date:
ASSETS	Amount in \$	ASSETS	Amount in \$
Cash – Checking:		Cash – Checking:	
Cash – Savings:		Cash – Savings:	
Securities:		Securities:	
Notes Receivable:		Notes Receivable:	
Life Insurance Cash Surrender Value:		Life Insurance Cash Surrender Value:	
Retirement Funds:		Retirement Funds:	
Real Estate Value:		Real Estate Value:	
Other Assets:		Other Assets:	
Total Assets:		Total Assets:	
LIABILITIES		LIABILITIES	
Current Debt:		Current Debt:	
Notes Payable:		Notes Payable:	
Taxes Payable:		Taxes Payable:	
Real Estate Mortgages:		Real Estate Mortgages:	
Other Liabilities:		Other Liabilities:	
Total Liabilities:		Total Liabilities:	
Net Worth:		Net Worth:	
SOURCES OF INCOME		SOURCES OF INCOME	
Employment Information:		Employment Information:	
Salary:		Salary:	
Bonus & Commissions:		Bonus & Commissions:	
Real Estate Income:		Real Estate Income:	
Other Income:		Other Income:	
Total Income:		Total Income:	