

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 (Total 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)