

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/Note 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	
Education loans	
Medical/Other past due bills	
Life insurance loans	
Bank loans	
Other debt and loans	

Total Liabilities:

Net Worth (Total assets minus total liabilities)