

**PERSONAL FINANCIAL STATEMENT AS OF : \_\_\_\_\_, 20\_\_\_\_\_**

Name of Individual	Social Security Number	Date of Birth
Name of Spouse	Social Security Number	Date of Birth
Residential Address (Street, City, State, Zip Code)		Home Phone Number (Including Area Code)

<b>ASSETS</b>		<b>LIABILITIES</b>	
Cash in Banks:		Loans Payable (Banks):	
Notes Receivable:		Notes Payable:	
Accounts Receivable:		Accounts Payable:	
Stocks/Bonds/Securities:		Taxes Payable:	
Real Estate (Residence):		Mortgages Payable:	
Real Estate (Investment/Other):		Other Liabilities:	
Cash Value Life Insurance:			
Personal Property:		<b>TOTAL LIABILITIES:</b>	
Other Assets:		<b>NET WORTH:</b>	
<b>TOTAL ASSETS:</b>		<b>TOTAL NET WORTH &amp; LIABILITIES:</b>	

INCOME	Salary: \$	Spouse's Salary: \$	TOTAL INCOME:
	Bonus/Other: \$	Bonus/Other: \$	\$

**SUPPLEMENTARY SCHEDULES OF ASSETS & LIABILITIES**

(NOTE: All data listed above must appear in the appropriate schedules.)

**CASH IN BANKS**

Bank Name, Branch & Location	Account Number	Amount

**NOTES & ACCOUNTS RECEIVABLE**

Name & Address of Debtor	Amount	Due Date	Pledged (yes/no)	Security

**STOCKS/BONDS/SECURITIES**

Name & Number(s) of Stock, Bond or Security	No. of Shares	Price/Share	Market Value	Exchange & Call Sign

<b>REAL ESTATE</b>							
Location/Description	Year Acquired	Cost	Market Value	Monthly Income	Monthly Paymen	Mortgage Balance	Mortgage or Lienholder

<b>CASH VALUE OF LIFE INSURANCE</b>				
Name of Insurance Company	Beneficiary	Face Value	Cash Value	Loans Outstanding

<b>OTHER ASSETS</b>				
Description	Title Holder	Cost	Market Value	Age of Asset

<b>LOANS PAYABLE</b>				
Name of Lender	Address	Balance Due	Amount Due in One Year	How Secured

<b>ACCOUNTS &amp; NOTES PAYABLE (Including Charge Accounts)</b>					
Payable to Whom	Address	Amount	Monthly Payment	Due Date	How Secured

<b>TAXES PAYABLE (State &amp; Federal)</b>		
Description	Amount	Date Payment is Due

<b>OTHER LIABILITIES</b>					
Description	Payable to Whom	Amount	Monthly Payment	Due Date	How Secured

Are you contingently liable or an endorser on any bonds or other obligations? YES NO  
 Are you involved in any litigation? YES\* NO Have you filed for bankruptcy in the last 7 years? YES\* NO  
 \*Explain all "YES" answers on a separate attachment.

I/We hereby certify and declare that the above statements presents accurately my/our financial condition to the best of my/our knowledge and belief.

By: \_\_\_\_\_ Date: \_\_\_\_\_ By: \_\_\_\_\_ Date: \_\_\_\_\_