

PERSONAL FINANCIAL STATEMENT

PERSONAL INFORMATION

Name _____	Statement Date _____
Address _____	SSN _____
City, State, Zip _____	Birthday _____
Home Tel. No. _____	Dependents: _____

ASSETS	Value	LIABILITIES	Value
Cash on Hand & In Bank	_____	Notes Due to Banks	_____
Cash Value of Life Insurance	_____	Notes Due to Relatives & Friends	_____
Government Securities	_____	Notes Due to Others	_____
Other Marketable Securities	_____	Account & Bills Payable	_____
Notes & Account Receivable (Good)	_____	Unpaid Income Taxes (Federal State)	_____
Other Assets Readily Convertible:		Other Unpaid taxes & Interest	_____
a) _____	_____	Loan on Life Insurance Policies	_____
b) _____	_____	Contract Account Payable	_____
c) _____	_____	Cash Rent Owed	_____
Total Current Assets		Other Liabilities Due within 1 year	
Real Estate Owned	_____	a) _____	_____
Mortgages & Contracts Owned	_____	b) _____	_____
Notes Accounts Receivable (Doubtful)	_____	Total Current Liabilities	
Notes Due From Relatives & Friends	_____	Real Estate Mortgage Payable	_____
Other Securities (Not Marketable)	_____	Liens & Assessments Payable	_____
Personal Property	_____	Other Debts:	
Other Assets:		a) _____	_____
a) _____	_____	b) _____	_____
b) _____	_____	c) _____	_____
c) _____	_____	Total Liabilities	_____
d) _____	_____	Net Worth	_____
Total Assets	_____	Total Liabilities & Net Worth	_____

ANNUAL INCOME	ESTIMATED ANNUAL EXPENSES
Salary, Bonuses & Commissions	Income Taxes
Dividends & Interest	Other Taxes
Rental & Lease Income (Net) Other	Insurance Premiums
Income	Mortgage Payments
a) _____	Rent Payable
b) _____	Other Expenses
d) _____	a) _____
e) _____	b) _____
Total Annual Income	Total Estimated Annual Expenses

GENERAL INFORMATION	CONTINGENT LIABILITIES
Are any Assets Pledged? Yes No	As Endorses, Co-maker or Guarantor
Defendant in any Suits? Yes No	On Leases or Contracts
	Legal Claims
Ever declared Bankrupt? Yes No	Federal (State Income Taxes)
	Other