



PERSONAL FINANCIAL STATEMENT- STRICTLY CONFIDENTIAL

Name: _____

Street: _____

City: _____ State: _____ Zip Code: _____

Does this Personal Financial Statement include Community Property co-owned by your spouse _____?

Assets

Cash on Hand and in Banks	\$
U.S. Government Securities	
Retirement Accounts (IRA, 401K, 403B, SEP, etc.)	
Accounts, Loans and Notes Receivable	
Cash Surrender Value Life Insurance	
Value of Businesses Owned	
Marketable Stocks and Bonds (Publicly Traded)	
Personal Residence / Homestead	
Other Real Estate	
Automobiles- Number ()	
Household Furnishing and Personal Property / Effects	
Other Assets (itemized)	

Total Assets \$ _____

Liabilities and Net Worth

Mortgage on Personal Residence / Homestead	\$
Home Equity Loan or Line of Credit on Personal Residence / Homestead	
Liens on Other Real Estate	
Consumer Loans Payable to Banks, including Auto / Credit Cards	
Notes Payable to banks / others	
Other Liabilities (Itemized)	

Total Liabilities \$ _____

Net Worth \$ _____

Sources of Income (Annualized)

Current Salary	\$
Dividends and Interest	
Bonus and Commissions	
Other Real Estate Income	
Other Income	
Total Income	\$

The undersigned certifies that this information is **true and correct to the best of his / her knowledge.**

Date: _____ Signature: _____ Phone: _____