**PERSONAL FINANCIAL STATEMENT OF**

**[NAME]**

**Prepared on:** **[DATE]**

**MAILING ADDRESS**: [MAILING ADDRESS]

Spouse’s Name (if applicable): [SPOUSE'S NAME]

**ASSETS\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

*Provide the total value of each asset class; if you have more than one account or item, add up the individual amounts. See the attachment to provide greater detail.*

**Checking Accounts** [AMOUNT AVAILABLE]

**Savings Accounts** [AMOUNT AVAILABLE]

**Certificates of Deposit** [TOTAL VALUE]

**Securities (Stocks/Bonds/Mutual Funds)** [TOTAL VALUE]

**Notes Receivable** [TOTAL VALUE]

**Personal Property** [MARKET VALUE]

**Real Estate** [MARKET VALUE]

**Life Insurance** [CASH SURRENDER VALUE]

**Retirement Accounts** [TOTAL VALUE]

**Other Assets** [TOTAL VALUE]

**TOTAL ASSETS:** [SUM OF ALL ASSETS]

**LIABILITIES\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

*Provide the total value of each liability type; if you have more than one of a category, add up the individual amounts. See the attachment to provide greater detail.*

**Credit Card Debt** [TOTAL OWED]

**Student Loans** [TOTAL OWED]

**Vehicle Loans** [TOTAL OWED]

**Real Property Mortgages** [TOTAL OWED]

**Notes Payable/Promissory Notes** [TOTAL OWED]

**Other Liabilities** [TOTAL OWED]

**TOTAL LIABILITIES:** [SUM OF ALL LIABILITIES]

**NET WORTH**

[SUM OF ALL ASSETS] - [SUM OF ALL LIABILITIES] = [NET WORTH]

**CERTIFICATION**

I certify that the information contained in this statement is true and accurate to the best of my knowledge on the date indicated. I agree that, if after submitting this statement, there are any material changes to my finances that would impact the information it contains, I have an affirmative duty to alert the person or entity receiving this statement as soon as possible. I acknowledge that, as a result of submitting this statement, further inquiries, including a credit report, may be necessary to verify the information contained, and I hereby authorize the person or entity receiving those statements to make such inquiries.

**Signature**: [\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_](https://esign.com/) Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Print Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**ATTACHMENT A: ASSET DETAILS**

*Use this to provide greater detail about the numbers provided on the first page. Using each segment provided is not required. If more segments are needed for a given category, append an additional page.*

**Checking Accounts:** Provide the following information for each checking account

[INSTITUTION NAME] [ACCOUNT NUMBER] [AMOUNT AVAILABLE]

[INSTITUTION NAME] [ACCOUNT NUMBER] [AMOUNT AVAILABLE]

[INSTITUTION NAME] [ACCOUNT NUMBER] [AMOUNT AVAILABLE]

**Savings Accounts:** Provide the following information for each savings account

[INSTITUTION NAME] [AMOUNT AVAILABLE]

[INSTITUTION NAME] [AMOUNT AVAILABLE]

[INSTITUTION NAME] [AMOUNT AVAILABLE]

**Certificates of Deposit:** Provide the following information for each certificate of deposit

[INSTITUTION NAME] [VALUE]

[INSTITUTION NAME] [VALUE]

[INSTITUTION NAME] [VALUE]

**Securities**: Provide the following information for each stock, bond or mutual fund

[ISSUER OR COMPANY] [NUMBER OF SHARES] [VALUE]

[ISSUER OR COMPANY] [NUMBER OF SHARES] [VALUE]

[ISSUER OR COMPANY] [NUMBER OF SHARES] [VALUE]

[ISSUER OR COMPANY] [NUMBER OF SHARES] [VALUE]

[ISSUER OR COMPANY] [NUMBER OF SHARES] [VALUE]

[ISSUER OR COMPANY] [NUMBER OF SHARES] [VALUE]

**Notes Receivable:** Provided the following information about owed funds

[DEBTOR] [DATE DUE] [AMOUNT OWED]

[DEBTOR] [DATE DUE] [AMOUNT OWED]

[DEBTOR] [DATE DUE] [AMOUNT OWED]

**Personal Property:** Provide the following information for personal property

Vehicles

[VEHICLE DESCRIPTION] [VEHICLE VALUE]

[VEHICLE DESCRIPTION] [VEHICLE VALUE]

[VEHICLE DESCRIPTION] [VEHICLE VALUE]

Jewelry/Antiques/Collectibles

[ITEM DESCRIPTION] [ITEM VALUE]

[ITEM DESCRIPTION] [ITEM VALUE]

[ITEM DESCRIPTION] [ITEM VALUE]

[ITEM DESCRIPTION] [ITEM VALUE]

Other Personal Property

[ITEM DESCRIPTION] [ITEM VALUE]

[ITEM DESCRIPTION] [ITEM VALUE]

[ITEM DESCRIPTION] [ITEM VALUE]

[ITEM DESCRIPTION] [ITEM VALUE]

[ITEM DESCRIPTION] [ITEM VALUE]

[ITEM DESCRIPTION] [ITEM VALUE]

**Real Property:** Provide the following information for real property

Primary Residence

[PROPERTY LOCATION] [MARKET VALUE]

 Vacation/Investment Properties

[PROPERTY LOCATION] [MARKET VALUE] [PROPERTY LOCATION] [MARKET VALUE] [PROPERTY LOCATION] [MARKET VALUE] Other Real Property

[PROPERTY LOCATION] [MARKET VALUE] [PROPERTY LOCATION] [MARKET VALUE] [PROPERTY LOCATION] [MARKET VALUE]

**Life Insurance:** Provide the following information for each life insurance policy

[INSURER] [POLICY NUMBER] [SURRENDER VALUE]

[INSURER] [POLICY NUMBER] [SURRENDER VALUE]

**Retirement Accounts**: Provide the following information for each Roth IRA, 401(k) or other retirement account

[TYPE OF PLAN] [PLAN PROVIDER] [CURRENT VALUE]

[TYPE OF PLAN] [PLAN PROVIDER] [CURRENT VALUE]

[TYPE OF PLAN] [PLAN PROVIDER] [CURRENT VALUE]

**Other Assets:** Provide information for other assets, if any, that have not been addressed by the previous categories[ASSET DESCRIPTION][TOTAL VALUE]

[ASSET DESCRIPTION][TOTAL VALUE]

[ASSET DESCRIPTION][TOTAL VALUE]

[ASSET DESCRIPTION][TOTAL VALUE]

[ASSET DESCRIPTION][TOTAL VALUE]

[ASSET DESCRIPTION][TOTAL VALUE]

[ASSET DESCRIPTION][TOTAL VALUE]

[ASSET DESCRIPTION][TOTAL VALUE]

**ATTACHMENT B: LIABILITY DETAILS**

*Use this to provide greater detail about the numbers provided on the first page. Using each segment provided is not required. If more segments are needed for a given category, append an additional page.*

**Credit Card Debt:** Provide the following information for each indebted card

[CREDIT CARD COMPANY] [ACCOUNT NUMBER] [BALANCE]

[CREDIT CARD COMPANY] [ACCOUNT NUMBER] [BALANCE]

[CREDIT CARD COMPANY] [ACCOUNT NUMBER] [BALANCE]

**Student Loans**: Provide the following information about any pending student loans:

[LOAN PROVIDER] [ACCOUNT NUMBER] [BALANCE]

[LOAN PROVIDER] [ACCOUNT NUMBER] [BALANCE]

[LOAN PROVIDER] [ACCOUNT NUMBER] [BALANCE]

**Vehicle Loans:** Provide the following information about any outstand vehicle loans:

[LOAN PROVIDER] [VEHICLE DESCRIPTION] [BALANCE]

[LOAN PROVIDER] [VEHICLE DESCRIPTION] [BALANCE]

[LOAN PROVIDER] [VEHICLE DESCRIPTION] [BALANCE]

**Mortgages**: Provide the following information about real property mortgages

[LENDER] [PROPERTY DESCRIPTION] [AMOUNT OWED]

[LENDER] [PROPERTY DESCRIPTION] [AMOUNT OWED]

[LENDER] [PROPERTY DESCRIPTION] [AMOUNT OWED]

**Notes Payable/Promissory Notes**: Provide the following information about any unextinguished notes payable or promissory notes

[CREDITOR] [DATE DUE] [AMOUNT OWED]

[CREDITOR] [DATE DUE] [AMOUNT OWED]

[CREDITOR] [DATE DUE] [AMOUNT OWED]

[CREDITOR] [DATE DUE] [AMOUNT OWED]

**Other Liabilities:** Provide information for other liabilities, if any, that have not been addressed by the previous categories[LIABILITY DESCRIPTION][TOTAL OWED]

[LIABILITY DESCRIPTION][TOTAL OWED]

[LIABILITY DESCRIPTION][TOTAL OWED]

[LIABILITY DESCRIPTION][TOTAL OWED]

[LIABILITY DESCRIPTION][TOTAL OWED]

[LIABILITY DESCRIPTION][TOTAL OWED]

[LIABILITY DESCRIPTION][TOTAL OWED]

[LIABILITY DESCRIPTION][TOTAL OWED]