

PERSONAL FINANCIAL STATEMENT OF

Prepared on: _____

MAILING ADDRESS: _____

Spouse's Name (if applicable): _____

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	\$ _____
Savings Accounts	\$ _____
Certificates of Deposit	\$ _____
Securities (Stocks/Bonds/Mutual Funds)	\$ _____
Notes Receivable	\$ _____
Personal Property	\$ _____
Real Estate	\$ _____
Life Insurance	\$ _____
Retirement Accounts	\$ _____
Other Assets	\$ _____
TOTAL 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	\$ _____
Student Loans	\$ _____
Vehicle Loans	\$ _____
Real Property Mortgages	\$ _____
Notes Payable/Promissory Notes	\$ _____
Other Liabilities	\$ _____
TOTAL 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: _____ **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 name of the institution holding the account and the amount available

_____	\$ _____
_____	\$ _____
_____	\$ _____

Savings Accounts: Provide the name of the institution holding the account and the amount available

_____	\$ _____
_____	\$ _____
_____	\$ _____

Certificates of Deposit: For each certificate of deposit, provide the name of the institution holding it and the amount available

_____	\$ _____
_____	\$ _____
_____	\$ _____

Securities: For each stock, bond or mutual fund, provide the name of the company or issuer, the number of shares owned, and the shares' market value

_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____

Notes Receivable: For each note receivable, provided the name of the debtor, the date on which the note is due, and the amount owed

_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____

Personal Property: Provide a description and the market value for each item of personal property

Vehicles

_____	\$ _____
_____	\$ _____
_____	\$ _____

Jewelry/Antiques/Collectibles

\$ _____
\$ _____
\$ _____
\$ _____

Other Personal Property

\$ _____
\$ _____
\$ _____
\$ _____
\$ _____
\$ _____

Real Property: For each parcel of real property, provide the address and the market value as of the date of this statement

Primary Residence

\$ _____

Vacation/Investment Properties

\$ _____
\$ _____
\$ _____

Other Real Property

\$ _____
\$ _____
\$ _____

Life Insurance: Provide the insurer's name, the policy number, and the surrender value for each life insurance policy

\$ _____
\$ _____

Retirement Accounts: Provide the type of plan, the plan provider and current value for each Roth IRA, 401(k) or other retirement account

\$ _____
\$ _____
\$ _____

Other Assets: For other assets, if any, that have not been addressed by the previous categories, provide a brief description and the asset's value

\$ _____
\$ _____
\$ _____
\$ _____
\$ _____
\$ _____

