

PERSONAL FINANCIAL STATEMENT

Name (First, MI, Last) _____

Address (includes City, County, State and Zip Code) _____

phone number _____

ASSETS

Cash in Bank (checking) \$ _____

Cash in Bank (savings) \$ _____

STOCKS AND BONDS
\$ _____

REAL ESTATE
Home \$ _____
Other Real Estate \$ _____

CONTRACTS OWNED \$ _____

Automobile(s) TAXES OWING (incl. Income tax)
\$ _____ Make _____ Yr. _____
\$ _____ Make _____ Yr. _____

OWING ON AUTOMOBILES \$ _____

NOTES/ACCOUNTS COLLECT \$ _____

RELATIVES \$ _____

OTHERS \$ _____

CASH VALUE LIFE INS. \$ _____

OTHER ASSETS (DESCRIBE)
_____ \$ _____
_____ \$ _____
_____ \$ _____

TOTAL ASSETS \$ _____

INCOME FOR YEAR ENDING _____

SALARY \$ _____

BONUS & COMMISSIONS \$ _____

DIVIDENDS \$ _____

REAL ESTATE INCOME \$ _____

OTHER INCOME \$ _____

TOTAL INCOME \$ _____

LIABILITIES

Due to _____ Bank \$ _____

Due to _____ Bank \$ _____

Due to Relatives \$ _____

Due to Others \$ _____

REAL ESTATE MORTGAGES
Home \$ _____
Other Real Estate \$ _____

OWN ON CONTRACTS \$ _____

OTHER PERSONAL BILLS \$ _____

_____ \$ _____

_____ \$ _____

_____ \$ _____

_____ \$ _____

TOTAL LIABILITIES \$ _____

NET WORTH \$ _____

EMPLOYED BY: _____

OTHER BUSINESS INTERESTS _____

Signature: _____

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