

# Personal Financial Statement

Date: \_\_\_\_\_

## ASSETS (Present Market Value)

Cash on hand/ Checking account	\$
Savings	
Stocks and bonds	
Cash value of life insurance	
Coins	
Home	
Other real estate	
Mortgages/Notes receivable	
Business valuation	
Automobiles	
Furniture	
Jewelry	
Other personal property	
Pension/Retirement	
Other Assets	

**Total Assets** \$

## LIABILITIES (Current amount owed)

Credit card debt	\$
Automobile loans	
Home mortgages	
Personal debt to relatives	
Business loans	
Educational loans	
Medical/Other past due bills	
Life insurance loans	
Bank loans	
Other debts and loans	

**Total Liabilities:** \$

**NET WORTH** (Total assets minus total liabilities) \$

PERSONAL FINANCIAL STATEMENT