

**INDIVIDUAL
PERSONAL FINANCIAL STATEMENT**

Prepared for

On

NAME:

ADDRESS:

HOME PHONE:

CELL PHONE:

SSN:

BIRTHDATE:

DETAILED SUMMARY LISTING OF ASSETS

INDIVIDUAL ASSET INFORMATION

AMOUNT

Accounts Receivable:	
Annuity:	
Boats:	
Bonds	
Business Property and Real Estate:	
Certificate of Deposit:	
Checking Accounts:	
Household Furnishings:	
Jewelry:	
Life Insurance:	
Mutual Funds:	
Notes Receivable:	
Other Assets:	
Other Real Estate:	
Personal Residence Real Estate:	
Recreational Equipment:	
Retirement Plans:	
Savings Accounts:	
Stocks:	
Trusts:	
Vehicles	

INDIVIDUAL TOTAL ASSET VALUE:

DETAILED SUMMARY LISTING OF LIABILITIES

INDIVIDUAL LIABILITY INFORMATION

AMOUNT

Mortgage or Rent:	
Home Equity Loan:	
Other Mortgage:	
Vehicle Loans:	
Credit Cards:	
Student Loans:	
Other Liabilities:	

INDIVIDUAL TOTAL LIABILITIES:

DETAILED SUMMARY LIST OF MONTHLY INCOME ASSET

INDIVIDUAL MONTHLY INCOME

MONTHLY AMOUNT

Monthly Salary or Wages:	
Investment Accounts:	
Alimony:	
Child Support:	
Trusts:	
Other Income Sources:	

INDIVIDUAL TOTAL MONTHLY INCOME ASSET:

DETAILED SUMMARY LIST OF MONTHLY EXPENSE LIABILITY

INDIVIDUAL MONTHLY EXPENSES

MONTHLY AMOUNT

Paid Alimony:	
Paid Child Care:	
Paid Child Support:	
Groceries:	
Healthcare or Medications:	
Housing or Rent:	
Other Mortgage Loans:	
Auto Loans:	
Auto Insurance:	
Health or Dental Insurance:	

Life Insurance:
Other Insurance:
Credit Cards:
Student Loans:
Other Expenses:

INDIVIDUAL TOTAL MONTHLY EXPENSE LIABILITY:

NET WORTH SUMMARY

TOTAL ASSETS:

TOTAL LIABILITIES:

TOTAL NET WORTH:

I, _____, hereby certify and warrant, to the best of my knowledge, that the
aforementioned information contained within this Personal Financial Statement is true, accurate and complete.

Signature

Dated: