

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 _____

EQUITY IN BUSINESS _____

REAL ESTATE
 Home _____

Other Real Estate _____

CONTRACTS OWNED _____

AUTOMOBILE(S) OWNED
 Make _____ Yr. _____
 Make _____ Yr. _____

NOTES/ACCNTS COLLECT _____

RELATIVES _____

OTHERS _____

CASH VALUE LIFE INS. _____

OTHER ASSETS (Please 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 _____

OWE ON CONTRACTS _____

OWING ON AUTOMOBILES _____

TAXES OWING (Incl. Income Tax) _____

OTHER PERSONAL BILLS (Please describe) _____

TOTAL LIABILITIES _____

NET WORTH _____

EMPLOYED BY: _____

OTHER BUSINESS INTERESTS: _____

Signature _____