



PERSONAL FINANCIAL STATEMENT

Date: _____

Assets (Market Value)	
Cash	
Checking Accounts	
Savings Accounts	
Other Liquid Assets	
Home	
Auto	
Colletables (Antiques, Coins, etc.)	
Other Personal Property	
Retirement	
Real Estate	
Certificate of Deposit	
Stocks/Bonds	
Money Market Funds	
Mutual Funds	
Other Investments	
Total Assets	

Liabilities (Amount Owed)	
Home Mortgages	
Home Equity Loans	
Auto Loans	
School Loans	
Business Loans	
Bank Loans	
Other Loans	
Credit Card Bills	
Medical Bills	
Other Debt Owed	
Total Liabilities	

Net Worth Summary	
Assets	
- Liabilities	
Total Net Worth	

Notes