

# Personal Financial Statement

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

## ASSETS (Present Market Value)

Cash on hand/ Checking account	<input type="text"/>
Savings	<input type="text"/>
Stocks and bonds	<input type="text"/>
Cash value of life insurance	<input type="text"/>
Coins	<input type="text"/>
Home	<input type="text"/>
Other real estate	<input type="text"/>
Mortgages/Notes receivable	<input type="text"/>
Business valuation	<input type="text"/>
Automobiles	<input type="text"/>
Furniture	<input type="text"/>
Jewelry	<input type="text"/>
Other personal property	<input type="text"/>
Pension/Retirement	<input type="text"/>
Other Assets	<input type="text"/>

**Total Assets:**

## LIABILITIES (Current amount owed)

Credit card debt	<input type="text"/>
Automobile loans	<input type="text"/>
Home mortgages	<input type="text"/>
Personal debt to relatives	<input type="text"/>
Business loans	<input type="text"/>
Educational loans	<input type="text"/>
Medical/Other past due bills	<input type="text"/>
Life insurance loans	<input type="text"/>
Bank loans	<input type="text"/>
Other debts and loans	<input type="text"/>

**Total Liabilities:**

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