

# Personal Financial Statement

## Personal Information

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State, ZIP: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_  
Date: \_\_\_\_\_

## Assets

Item	Amount
Cash & Bank Accounts	_____
Investments	_____
Retirement Accounts	_____
Real Estate	_____
Personal Property	_____
Other	_____
<b>Total Assets</b>	_____

## Liabilities

Item	Amount
Credit Card Debt	_____
Mortgages	_____
Loans Payable	_____
Auto Loans	_____
Other	_____
<b>Total Liabilities</b>	_____

## Net Worth Calculation

Total Assets	_____
Less: Total Liabilities	_____
<b>Net Worth</b>	_____

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

