



Personal Finance Statement

Assets (omit cents)	Liabilities (omit cents)
Cash on Hand & in Banks _____	Accounts Payable _____
Savings Accounts _____	Notes Payable to Banks and Others (Sect. 2) _____
IRA or Other Retirement Accounts (Sect. 5) _____	Installment Accounts (Auto) _____
Accounts & Notes Receivable (Sect. 5) _____	Monthly Payments _____
Life Insurance – Cash Surrender Value Only (Sect. 8) _____	Installment Accounts (Other) _____
Stocks and Bonds (Sect. 3) _____	Monthly Payments _____
Real Estate (Sect. 4) _____	Loan(s) Against Life Insurance _____
Automobiles (Sect. 5) _____	Mortgage or Real Estate (Sect. 4) _____
Other Personal Property (Sect. 5) _____	Unpaid Taxes (Sect. 6) _____
Other Assets (Sect. 5) _____	Other Liabilities (Sect. 7) _____
Total Assets _____	Total Liabilities _____
NET Worth _____	
Section 1. Source of Income	Contingent Liabilities
Salary _____	As Endorser or Co-Maker _____
NET Investment Income _____	Legal Claims and Judgements _____
Real Estate Income _____	Provision for Federal Income Tax _____
Other Income (Desc. Below) _____	Other Special Debt _____
Description of Other Income in Section 1	

Section 2. Notes Payable to Banks and Others

Names and Addresses of Noteholder(s)	Original Balance	Current Balance	Payment Amount	How Often	How Secured or Endorsed Type of Coll.

Section 3. Stocks and Bonds

Number of Shares	Name of Securities	Cost	Market Value	Date of Acquisition	Total Value

Section 4. Real Estate Owned - Attach REO Schedule and Track History, if necessary

	Property A	Property B	Property C
Type of Real Estate			
Full Address			
Date Purchased			
Original Cost			
Current Value			
Mortgage Holder			
Mortgage Balance			
Monthly Payment			
Status of Mortgage			



Section 5. Other Personal Property and Other Assets

Section 6. Unpaid Taxes

Section 7. Other Liabilities

Section 8. Life Insurance Held

Please complete the fill in fields, then return WITHOUT signing or adding your SS#. Once reviewed, I will send to you via DocuSign to sign and date.

By signing below, you confirm the information provided to be true and accurate to the best of your knowledge.

Name:

SS#:

Signature

Date