

1. PERSONAL INFORMATION

Full Legal Name				
Legal Address				
Birth of Date		Birthplace		
Soc. Security #		Date Married	If A Veteran, Date of Service	
Passport #				
Spouse Name			If Spouse is Deceased, Date of Death	
Spouse's SS #				
Child 1 Name			Child 1 Age	
Child 2 Name			Child 2 Age	
Child 3 Name			Child 3 Age	
Child 4 Name			Child 4 Age	

2. IMPORTANT CONTACTS

	Name	Address	Email	Phone
Attorney				
Accountant				
Executor of Will				
Financial Advisor				
Power of Attorney				
Durable Power of Attorney				

3. IMPORTANT DOCUMENTS (If documents are stored online, please note the file name app or website)

Documents	Date of Preparation	Location
Will		
Living Will		
Deed(S)/Mortgage(S)		
Marriage Certificate		
Apartment Lease		

PERSONAL FINANCIAL STATEMENT FOR 20__

3.1. HEALTH INSURANCE / MEDICARE / MEDICAID		
Insurer	Member ID	Policy or Group Number

3.2. INCOME TAX RETURNS	
Tax Year	Location

3.3. SAFETY DEPOSIT BOXES			
Name of Bank	Bank Address	Key Location	Documents Held

3.4. PASSPORT	
Passport Number	Location

PERSONAL FINANCIAL STATEMENT FOR 20__

4. FINANCIAL ACCOUNTS

4.1. BANK ACCOUNTS

Name of Bank	Type of Account	Account Number	Routing Number

4.2. INSURANCE POLICIES

Type	Issuer	Amount	Beneficiary(ies)

4.3. CREDIT CARDS

Issuer	Account Number	Expiration Date	3-Digit Sec. Code

4.4. SECURITIES ACCOUNTS

Company	Location / Site	Account Number

PERSONAL FINANCIAL STATEMENT FOR 20__

4.5. RETIREMENT ACCOUNTS: PENSION PLANS

Name of Company	Where is the Plan Held?	Account Number

4.6. RETIREMENT ACCOUNTS: 401K / IRA

Type	Account No.	Plan Provider	Contact Info	Beneficiaries

5. ASSETS

5.1. SECURITIES (Attach most recent statement)

Company / Broker	Account No.	Joint-Account Holder	Beneficiaries	Value

5.2. REAL ESTATE

Description	Location	Current Value

5.3. AUTOMOBILES

Year	Make	Model	Own or Lease	Location of Title	Current Value

PERSONAL FINANCIAL STATEMENT FOR 20__

5.4. OTHER COLLECTIBLES: INCLUDE JEWELRY, ARTWORK, ETC. (Add additional list if necessary)

Description	Current Value

6. PERSONAL BALANCE SHEET

6.1. INCOME

	Description	Amount After Tax (Per Month)
Earnings Statement		
Other Pay Statements		
Other Monthly Income		

6.2. EXPENSES – MONTHLY BILLS AND UTILITIES

	Provider	Monthly Amount
Monthly Rent		
Electricity		
Gas		
Phone(s) (Home & Mobile)		
Cable / Satellite TV		
Internet		
Utilities (Water / Sewage / Garbage / Etc.)		
Insurance		

6.3. DEBT PAYMENT

	Creditor	Total Balance Owed	APR
Car Loans			
Personal Loans			
Student Loans			
Credit Cards			
Monthly Mortgage Payment			
Other Debt			

PERSONAL FINANCIAL STATEMENT FOR 20__

7. LOGIN CREDENTIALS & PASSCODES

7.1. Important Website Account

Account	Username or Login E-mail	Location of Passcode (Passcode Hint)