Personal Financial Statement

Today's Date

Month Day Year

Name *

First Name Last Name

Address *

Street Address

Street Address Line 2

City State / Province

Postal / Zip Code

Phone Number *

SSN *

Email *

Marital status *

Employer *

Name

First Name

Last Name

Address

Street Address

Street Address Line 2

City

State / Province

Postal / Zip Code

Phone number

SSN

Employer

Marital status

Email

Assets

	Client 1	Client 2	Joint	Total

Cash, Money Market, Cds				
Marketable Securities				
Closely-Held Securities				
Accounts or Notes Receivable				
Cash Value of Life Insurance				
Personal Residence				
Other Real Estate				
Personal Property				
Retirement Accounts				
Other Assets				
Total				

Sources Of Annual Income

	Client 1	Client 2	Joint	Total
Wages & Salaries				
Commissions, Bonouses, Ect.				
Interest and Dividends				
Net Rental Income				
Dist. & Partnership Draws				
Total Income				

Liabilities

	Client 1	Client 2	Joint	Total
Notes Payable to Banks				
Other Notes Payable				
Student Loans				
Credit Cards				
Auto Loans				
Real Estate Mortgages				
Margin Accounts				
Other Liabilities				
Total				
Net Worth				

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