

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

Generational Wealth Management

wealthstrategiespartners.com

Nashville Office 5500 Maryland Way, Suite 133 Brentwood, TN 37027	P: 615-457-3481 TF: 855-372-5295	Sarasota Office 400 Barns Court Sarasota, FL 34236	P: 941-413-0570 TF: 855-372-5295	<i>Securities offered through Raymond James Financial Services, Inc., member FINRA / SIPC. Investment advisory services offered through Raymond James Financial Services Advisors, Inc. Wealth Strategies Partners is not a registered broker/dealer and is independent of Raymond James Financial Services.</i>
--	-------------------------------------	---	-------------------------------------	--