



Personal Financial Statement

Schedule 1: Checking and Savings Accounts

	Bank Name	Account Holder Name	Type(s) of Account	Balance
Total				

Schedule 2: Securities / stocks / bonds / mutual funds / stock in closely held companies (Attach additional information if needed)

	Name of Investment	Date of Acquisition	Number of Shares	Price Per Share	Total Value
Total					

Schedule 3: IRA's, 401(k), Retirement Accounts

	Bank / Brokerage	Amount	Name	Total Value
Total				

Schedule 4: Life Insurance

	Company Name / Person Insured	Beneficiary	Face Amount	Cash Value
Total Cash Value				

Schedule 5 & 7: Real Estate (Attach additional information if needed)

	Description / Location	Creditor Name	Monthly Payment	Amount Due	Market Value
Totals					

Schedule 6: Accounts Payable & Installment Loans

	Creditor Name	Collateral	Monthly Payment	Balance Due
Total				