

PERSONAL FINANCIAL/INCOME STATEMENT

AS OF _____ 2010

Name _____

Address _____

Phone Numbers: Primary () _____

Other () _____

ASSETS (attach schedule if necessary)

Cash on hand \$ _____
Savings Accounts _____
Checking Accounts _____
Certificates of Deposits _____
Stocks, bonds, mutual funds _____
Notes/Contracts receivables _____
Cash value of life insurance _____
Personal Property, i.e. jewelry, art, autos _____
Retirement Funds, i.e. IRA, 401K _____
Real Estate owned (market value) _____
Other Assets (attach separate explanation) _____
Total Assets (add Assets column) \$ _____

SOURCES/ANNUAL INCOME

Salary \$ _____
Interest _____
Bonuses _____
Commissions _____
Dividends _____
Real Estate _____
Other _____
Other _____
Other _____
TOTAL ANNUAL INCOME \$ _____

LIABILITIES (attach schedule if necessary)

Credit Cards \$ _____
Real Estate Loans _____
Other notes/loans _____
IRS /State Franchise Board (income tax) _____
Other liabilities (attach separate explanation) _____
Total Liabilities (add Liabilities column) \$ _____
Net Worth (subtract Liabilities from Assets) \$ _____

The above information is presented is a true and accurate representation of my financial condition as of the date executed.

Print Your Name

Sign Your Name