

Name: _____

Personal Financial Information

As of the following date: _____

ASSETS	Ref
Cash on hand	1 \$ _____
Checking accounts	2 _____
Savings accounts	3 _____
Money market accounts	4 _____
U.S. savings bonds	5 _____
U.S. Treasury securities	6 _____
Certificates of deposit	7 _____
Mutual funds	8 _____
Brokerage accounts	9 _____
Common and preferred stock	10 _____
Corporate bonds	11 _____
Municipal bonds	12 _____
_____	13 _____
Loans receivable from relatives	14 _____
Loans receivable from others	15 _____
_____	16 _____
Cash surrender value of life ins.	17 _____
_____	18 _____
Residence - primary	19 _____
Residence - second	20 _____
Rental property	21 _____
Land held for investment	22 _____
_____	23 _____
Vehicles	24 _____
_____	25 _____
401-K	26 _____
IRA - regular	27 _____
IRA - Roth	28 _____
Profit sharing plan	29 _____
Pension plans	30 _____
Medical savings accounts	31 _____
Other deferred benefits	32 _____
_____	33 _____
_____	34 _____
TOTAL ASSETS	35 \$ _____

LIABILITIES	Ref
Credit card balances	51 \$ _____
Loan on checking account	52 _____
_____	53 _____
Automobile loans	54 _____
_____	55 _____
_____	56 _____
First mortgage loan balance	57 _____
2nd mortgage/home equity loans	58 _____
Land contract balance	59 _____
_____	60 _____
_____	61 _____
Loans pertaining to investments	62 _____
_____	63 _____
Student loans	64 _____
_____	65 _____
Life insurance loan balance	66 _____
_____	67 _____
Other short-term loans	68 _____
_____	69 _____
Property taxes not current year	70 _____
_____	71 _____
Income taxes not current year	72 _____
_____	73 _____
TOTAL LIABILITIES	74 \$ _____

MONTHLY INCOME (before tax)	
Base salaries & wages	85 \$ _____
Commissions & bonuses	86 _____
Investment income	87 _____
Annuities & pensions	88 _____
Social security	89 _____
_____	90 _____
_____	91 _____
_____	92 _____
TOTAL MONTHLY INCOME	93 \$ _____

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