

Personal Financial Statement

NAME Jennifer Smith		BIRTHDAY (MM/DD/YYYY) 7/5/1991	SOCIAL INSURANCE NUMBER 666-55-8874
ADDRESS 123 Whatever Place			
HOME PHONE 222 555-2424	RESIDENCE <input checked="" type="checkbox"/> Own <input type="checkbox"/> Rent <input type="checkbox"/> Other		HOW LONG AT PRESENT ADDRESS? 10 Year 09 Month
OCCUPATION Attorney	CURRENT EMPLOYER Jennifer Law		HOW LONG AT PRESENT EMPLOYER? 06 Year 03 Month
EMPLOYER'S PHONE 222 666-4587	STATUS (Single includes Divorced and Widowed) <input type="checkbox"/> Married <input checked="" type="checkbox"/> Single <input type="checkbox"/> Separated		NUMBER OF DEPENDENTS 2

Spouse Information

NAME		BIRTHDAY (MM/DD/YYYY)	SOCIAL INSURANCE NUMBER
OCCUPATION	CURRENT EMPLOYER		HOW LONG AT PRESENT EMPLOYER?

Financial Information

Assets		Liabilities		
	Value		Balance Owng	Monthly Payment
Checking Balance	25,000	Bank Loans	0	0
Saving Balance	15,000	Real Estate Mortgages	250,000	2,000
Life Insurance Cash	0	Personal Lines of Credit	30,000	500
Stocks & Bond	0	Car Loans	40,000	15,000
Vehicles	35,000	Rent Payment		0
Account / Notes Receivables:		Credit Cards	Limit	
		Citibank	40,000	2,400
		AMEX	30,000	1,500
		Other Obligations		
Real Estate	300,000			
Retirement Account	45,000			
		Total Monthly Payments		21,400
Total Assets	420,000	Total Liabilities	323,900	
		Net Worth	96,100	