

# Personal Financial Statement

NAME <b>Samantha Stokes</b>		BIRTHDAY (MM/DD/YYYY) <b>8/6/1980</b>	SOCIAL INSURANCE NUMBER <b>555-41-4564</b>
ADDRESS <b>987 Whatever Place</b>			
HOME PHONE <b>111 222-4545</b>	RESIDENCE <input checked="" type="checkbox"/> Own <input type="checkbox"/> Rent <input type="checkbox"/> Other		HOW LONG AT PRESENT ADDRESS? <b>6</b> Year <b>09</b> Month
OCCUPATION <b>Physician</b>	CURRENT EMPLOYER <b>Medical Company</b>		HOW LONG AT PRESENT EMPLOYER? <b>06</b> Year <b>03</b> Month
EMPLOYER'S PHONE <b>333 111-2424</b>	STATUS (Single includes Divorced and Widowed) <input type="checkbox"/> Married <input checked="" type="checkbox"/> Single <input type="checkbox"/> Separated		NUMBER OF DEPENDENTS <b>2</b>

## Spouse Information

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

## Financial Information

Assets		Liabilities		
	Value		Balance Owing	Monthly Payment
Checking Balance	65,000	Bank Loans	100,000	4,000
Saving Balance	39,000	Real Estate Mortgages	400,000	2,500
Life Insurance Cash	0	Personal Lines of Credit	80,000	700
Stocks & Bond	200,000	Car Loans	72,000	900
Vehicles	80,000	Rent Payment		0
Account / Notes Receivables:		Credit Cards	Limit	
		Citibank	40,000	2,400
		AMEX	30,000	1,500
		Other Obligations		
Real Estate	450,000			
Retirement Account	800,000			
		Total Monthly Payments		12,000
Total Assets	1,634,000	Total Liabilities	655,900	
		Net Worth	978,100	