

Personal Financial Statement

PERSONAL BALANCE SHEET

Date: 08.08.2017

Assets

Remarks

Checking Account A	100
Savings Account A	1,000
Checking Account B	500
Savings Account B	2,000
Taxable Investment A	10,000
Taxable Investment B	5,000
Non-Taxable Investment A	20,000
Non-Taxable Investment B	20,000
401(K) Plan	5,000
403(B) Plan	-
Property A	200,000
Property B	75,000
Vehicle	15,000

Total Assets

353,600

Liabilities

Remarks

Credit Card A	(1,000)
Credit Card B	(2,000)
Student Loan	(100,000)
Vehicle Loan	(7,500)