

## Statement of Personal Finance Worksheet

*Use this form to get an overview of your personal financial situation. List only your PERSONAL assets and liabilities; Do NOT include those associated with the business.*

Personal Assets	Details/Description	Value
Cash and Checking Account:	Name of Bank:	\$
Savings Account:	Name of Bank:	\$
Pension Plans and Other Individual Retirement Accounts:	Agent:	\$
Money Owed to You:	Debtor:	\$
Life Insurance - Cash Value:	Insurance company:	\$
Stocks and Bonds:	Securities' Names:	\$
Property A - Current Market Price:	Type of Property/Date of Purchase:	\$
Property B - Current Resale Value:	Type of Property/Date of Purchase:	\$
Automobile - Resale Value:	Make/Model/Year/Mileage:	\$
Other Personal Property and Assets:	Description:	\$
Total Personal Assets		

Personal Liabilities	Creditor/Person with Claim	Monthly Payment	Balance
Loans from Family/Friends:		\$	\$
Credit Card:		\$	\$
Credit Card:		\$	\$
Credit Card:		\$	\$
Credit Card:		\$	\$
Credit Card:		\$	\$
Property Mortgage A:		\$	\$
Second Mortgage for Property A:		\$	\$
Property Mortgage B:		\$	\$
Second Mortgage for Property B:		\$	\$
Student Loans:		\$	\$
Life Insurance Loan:		\$	\$
Taxes to Pay:		\$	\$
Other Debts:		\$	\$
If Collateral - Loan Balance(s)		\$	\$
Total Personal Liabilities			\$
Estimated Total Value (Total Assets minus total Liabilities)			\$