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FINANCIAL STATEMENT

Date: _____

Name: _____

Address: _____

City, State, ZIP: _____

A S S E T S

Bank Accounts and Liquid Assets	Financial Institution	Estimated Value
Total Cash and Liquid Assets		

Long Term Assets	Financial Institution	Estimated Value
Retirement Acct		
Retirement Acct		
Retirement Acct		
Retirement Acct		
Partnership/ Corp		
Partnership/ Corp		
Total Long Term Assets		

Personal Property		Estimated Value
Furniture/ Household Items		
Vehicle(s) (see schedule page 3)		
Other (see schedule page 3)		
Total Personal		

Real Estate Assets	Address	Estimated Value
Residence(s)	(see RE schedule page 2)	
Investment RE	(see RE schedule page 2)	
Other Real Estate	(see RE schedule page 2)	
Total Real Estate Assets		

Other Assets	Estimated Value
(see schedule page 3)	
Total Other Assets	

TOTAL ASSETS	

L I A B I L I T I E S

Personal Loans and Consumer Debt (Mortgages on pg. 2)	Creditor	Amount Outstanding
Total Short Term Liabilities		

Real Estate Liabilities	Creditor	Loan Amount
Residence(s)	(see RE schedule page 2)	
Investment RE	(see RE schedule page 2)	
Other Real Estate	(see RE schedule page 2)	
Total Real Estate Liabilities		

Other Liabilities	Estimated Value
(see schedule page 3)	
Total Other Liabilities	

TOTAL LIABILITIES	

NET WORTH	

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REAL ESTATE SCHEDULE

Residence(s)							
Property Street Address	Property Type	Property Value	Mortgage Lender	Mortgage Balance	Monthly Payment	Monthly Insurance + Tax + HOA	
Total(s)							

Investment Real Estate							
Property Street Address	Property Type	Property Value	Mortgage Lender	Mortgage Balance	Monthly Payment	Monthly Insurance + Tax + HOA	Monthly Rental Income
Total(s)							

Other Real Estate							
Property Street Address	Property Type	Property Value	Mortgage Lender	Mortgage Balance	Monthly Payment	Monthly Insurance + Tax + HOA	Monthly Rental Income
Total(s)							

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SCHEDULES

Other Assets	
Description	Value
Total Value	

Other Liabilities	
Description	Value
Total Value	

Personal Property (Vehicles)	
Description	Value
Total Value	

Personal Property (Other)	
Description	Value
Total Value	