



PERSONAL FINANCIAL STATEMENT

ASSETS

Name of Asset	Name of Bank	Name Registered in	Current Balance
Cash			
Checking			
Savings			
Retirement - IRA			
Retirement - 401k/403b			
Retirement - Roth			
Stocks, Bonds, Mutual Funds			
Home			
Vehicle 1			
Vehicle 2			
Cash-Value Life Insurance			
Other			
Other			
Other			
Total Assets			

Liabilities

Description	Name of Bank	Monthly Payment	Current Balance
Credit Card 1			
Credit Card 2			
Loan - Home			
Loan - Vehicle 1			
Loan - Vehicle 2			
Loan - Other Real Estate			
Loan - Other			
Debts - Other			
Debts - Other			
Total Liabilities			

Net Worth

Total Net Worth	
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Assets - Liabilities = Net Worth