

Financial Statement

As of _____ [Date]

1. Personal Information

Full Name: _____

Address: _____

Phone: _____

Email: _____

Date of Birth: _____

2. Assets

Asset	Value
Cash & Bank Accounts	\$ _____
Investments (stocks, bonds)	\$ _____
Retirement Accounts	\$ _____
Real Estate (total)	\$ _____
Vehicles & Personal Property	\$ _____

Other Assets	\$ _____
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Total Assets: \$ _____

3. Liabilities

Liability	Amount Owed
Mortgages	\$ _____
Credit Cards	\$ _____
Loans (auto, student, personal)	\$ _____
Other Debts	\$ _____

Total Liabilities: \$ _____

4. Net Worth

Net Worth (Assets – Liabilities): \$ _____

5. Annual Income (Estimate)

Source	Amount
Salary	\$ _____

Other Income	\$ _____
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Total Income: \$ _____

6. Certification

I declare that the information provided is accurate to the best of my knowledge.

Signature: _____

Date: _____