

Client Name

Personal Financial Statement

Date

| Assets | | Liabilities | |
|---------------|------|------------------|------|
| Home | \$ - | Home Mortgage | \$ - |
| Joint Account | \$ - | Home Equity Line | \$ - |
| IRA | \$ - | Car Liability | \$ - |
| 401k | \$ - | | |
| | | | |
| | | | |
| <i>Total</i> | \$ - | <i>Total</i> | \$ - |

| | |
|-----------------------------|------|
| Net Worth as of Date | \$ - |
|-----------------------------|------|