



Personal Financial Statement

Do not send sensitive personal or financial information unless it is encrypted on a secure website.

Regular e-mails are not encrypted.

Round all amounts to the nearest \$100. Please contact your banker if you need assistance completing the schedules.

Schedule 1 Cash, Savings, Certificates of Deposit, and Money Market Accounts

Name of Bank or Financial Institution	Type of Account	Acct. Balance
(use attachments if necessary)		Total \$

Schedule 2 Stocks, Bonds, or Other Securities Owned

# of shares or bonds	Type of account	Name on account			Current market value
			<input type="checkbox"/> Listed	<input type="checkbox"/> Unlisted	
			<input type="checkbox"/> Listed	<input type="checkbox"/> Unlisted	
			<input type="checkbox"/> Listed	<input type="checkbox"/> Unlisted	
			<input type="checkbox"/> Listed	<input type="checkbox"/> Unlisted	
			<input type="checkbox"/> Listed	<input type="checkbox"/> Unlisted	
			<input type="checkbox"/> Listed	<input type="checkbox"/> Unlisted	
			<input type="checkbox"/> Listed	<input type="checkbox"/> Unlisted	
			<input type="checkbox"/> Listed	<input type="checkbox"/> Unlisted	
(use attachments if necessary)					Total \$

Schedule 3 Retirement, 401K, Profit Sharing, Pension, IRA Accounts, Keogh

Name of Institution	Account Type	Amount Vested %	Account Balance	Loans
(use attachments if necessary)				Totals \$

Schedule 4 Cash Value of Life Insurance (whole life only)

Insurance Company	Name Insured	Beneficiary	Face Value	Cash Value	Loans
(use attachments if necessary)					Totals \$

Schedule 5 Real Estate / Mortgages / Contract for deeds / Contracts Owned

Personal residence (homestead) Property Address	Lender/Creditor	Purchase		Market Value	Mortgage Balance	Monthly Payment	Monthly Rental Income	Maturity Date
		Year	Price					

Other Real Estate (rental homes, cabin, vacation homes, etc.) Property Address	Lender/Creditor	Purchase		Market Value	Mortgage Balance	Monthly Payment	Monthly Rental Income	Maturity Date
		Year	Price					
Totals \$								

(use attachments if more space is needed)

Commercial Real Estate, Investment Real Estate, Etc. Property Address	Lender/Creditor	Purchase		Market Value	Mortgage Balance	Monthly Payment	Monthly Rental Income	Maturity Date
		Year	Price					
Totals \$								

(Indicate if property is sold on contract for deed by marking "C4D" next to the property address)

