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Sample Personal Financial Statement

Also available in [PDF](#) | [MS Word](#)

If you want to see a snapshot of your finances at a particular point in time or wish to monitor fluctuations in the value of your assets or level of liabilities and net worth, you may find the sample Personal Financial Statement helpful. Each time you prepare a Personal Financial Statement you create a snapshot of your finances at a particular point in time. To monitor fluctuations in your finances, you may choose to prepare a financial statement periodically (on a set date every month, quarter, bi-yearly etc.) and compare statements.

Once you document all asset and liability figures, total your assets and liabilities. Next, subtract total liabilities from total assets to determine your net worth figure.

Assets	Cash\$	Checking\$	Savings\$	Securities\$	Accounts/Notes	Receivable\$	Real Estate\$	Household Goods\$	Vehicles\$	Cash Value	Life Insurance\$	401(k) Plan\$	Individual Retirement Accounts\$	Other Assets\$	TOTAL ASSETS\$	Liabilities	Notes Payable\$	Accounts/Bills Due\$	Credit Cards Payable\$	Vehicle Loans\$	Unpaid Taxes\$	Real Estate Mortgages Payable\$	Land Contracts Payable\$	Life Insurance Loans\$	Other Liabilities\$	TOTAL LIABILITIES	NET WORTH\$	TOTAL LIABILITIES AND NET WORTH\$	(Assets always equal Total Liabilities and Net Worth)
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QUALIFIED ATTORNEY?

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