



Please fill in the blanks with your current financial information.
Use the tab key to navigate to next field.

Personal Financial Statement

First & Last Name

Annual Income		Monthly Expenses		Yearly Expenses	
Annual wages #1		Rent/Mortgage (P & I only)		Property Taxes	
Annual wages #2		Medical Insurance Premium		House/Rent Insurance	
Commissions		Prescriptions		Car Insurance	
Bonuses		Credit Card Payments		Life Insurance	
Rental income		Land Phone, Cable & Internet		Vision/Dental Insurance	
Investment income		Cell Phone		Co-ins./Deductable	
Annual other income		Combined Utilities		Long-Term Care Ins.	
Monthly Income		Trash		Car & House Repairs	
Monthly Soc. Sec. #1		Groceries		Car License Renewal	
Monthly Soc. Sec. #2		Hygiene		Subscriptions/Memberships	
Total Monthly Soc. Sec		Clothes		Home Décor	
		Eating Out		Office Supply	
Monthly Pension #1		Car Payments		Vacations	
Monthly Pension #2		Gas for the Car		Christmas/Birthday Gifts	
Total Monthly Pension		Recreation		Charity Giving	
		Pet food/Vet bills		College Expenses	
		Fun Money/Allowance		Alimony/Child Support	
Total Annual Income		Misc. Expenses		Misc. Expenses	
TOTAL Mo. Income		TOTAL Expenses		DIFFERENCE	

Assets		Liabilities	
Cash		Co. Retirement Account #1	Mortgage 1
Checking Accounts		Co. Retirement Account #2	Mortgage 2
Savings Accounts		Traditional IRAs #1	HELOC
CD's		Traditional IRAs #2	Automobile Loan 1
Money Market Funds		Roth IRAs #1	Automobile Loan 2
HSA		Roth IRAs #2	Credit Card 1
Cash Value Life Ins.		Pensions #1	Credit Card 2
Other		Pensions #2	Credit Card 3
Total Cash		Total Retirement	Credit Card 4
			Personal Loans
Non-retirement		Home	Taxes Owed
Brokerage Accounts		Other Real Estate	Student Loans
Annuities		Business interests	Other
Other		Personal loans	Other
		Other	Other
Total Misc		Total Property	
Investable Assets		Total Assets	Total Liabilities
			Financial Net Worth

When you are finished, save this file under your last name & return it via [Dropbox](#)