

4386 S. Wynridge Lane  
West Valley City, UT 84128



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## Personal Financial Statement

\* Strictly Confidential \*

Name \_\_\_\_\_ Phone \_\_\_\_\_ Cell \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

### Assets

Cash on hand in banks	\$
Marketable securities	
Accounts, loans, and note receivable	
Residence real estate value	
Other real estate value	
Value of business owned	
Vehicles	
Household furnishings and personal effects	
Other assets (itemize)	
Total Assets	\$ _____

### Liabilities

Notes payable	\$
Credit cards payable	
Residence real estate mortgages	
Other liabilities (itemize)	
Total Liabilities	\$ _____
Net Worth (Assets minus liabilities)	\$ _____

### Sources of Income

Salary	\$
Dividends and interest	
Bonus and commissions	
Real estate income	
Other income	
Total Income	\$ _____

The undersigned certifies this financial information is provided by them personally and is true and correct.

Signature \_\_\_\_\_

Date \_\_\_\_\_