**Personal Business Financial Statement Form**

**Personal Information  
 Full Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
 Date of Birth: //\_\_\_\_\_\_  
 Home Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
 City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_\_\_ Zip Code: \_\_\_\_\_\_\_\_\_\_\_  
 Social Security Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Employment Details  
 Employer Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
 Employer Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
 Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
 Annual Income: $ \_\_\_\_\_\_\_\_\_\_\_\_**

**Assets**

* **Cash Assets**
  + **Cash in Hand: $ \_\_\_\_\_\_\_\_\_\_\_\_**
  + **Checking Account: $ \_\_\_\_\_\_\_\_\_\_\_\_**
  + **Savings Account: $ \_\_\_\_\_\_\_\_\_\_\_\_**
* **Investments**
  + **Stocks & Bonds: $ \_\_\_\_\_\_\_\_\_\_\_\_**
  + **Real Estate: $ \_\_\_\_\_\_\_\_\_\_\_\_**
  + **Business Ownership: $ \_\_\_\_\_\_\_\_\_\_\_\_**

**Liabilities**

* **Short-Term Liabilities**
  + **Credit Card Debt: $ \_\_\_\_\_\_\_\_\_\_\_\_**
  + **Personal Loans: $ \_\_\_\_\_\_\_\_\_\_\_\_**
* **Long-Term Liabilities**
  + **Mortgage: $ \_\_\_\_\_\_\_\_\_\_\_\_**
  + **Auto Loan: $ \_\_\_\_\_\_\_\_\_\_\_\_**
  + **Business Loan: $ \_\_\_\_\_\_\_\_\_\_\_\_**

| **Category** | **Description** | **Amount ($)** | **Notes** |
| --- | --- | --- | --- |
| **Cash on Hand** | **Liquid money available** |  |  |
| **Mortgage Payable** | **Home loan** |  |  |
| **Vehicle Loan** | **Car financing** |  |  |
| **Business Income** | **Profit from business** |  |  |
| **Investments** | **Stocks, bonds, etc.** |  |  |
| **Business Equity** | **Ownership shares** |  |  |
| **Total Liabilities** | **Sum of debts** |  |  |
| **Net Worth** | **Assets - Liabilities** |  |  |