**Standard Financial Statement Form**

#### **Personal Information**

* **Full Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Date of Birth: \_\_\_\_\_\_\_\_\_\_**
* **Social Security Number (SSN): \_\_\_\_\_\_\_\_\_\_**
* **Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

#### **Employment Information**

* **Current Employer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Position/Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Employment Status: ☐ Full-Time ☐ Part-Time ☐ Self-Employed ☐ Unemployed**
* **Annual Income: $\_\_\_\_\_\_\_\_\_\_**

#### **Financial Summary**

**☐ I have reviewed and verified the accuracy of my financial details.  
 ☐ I authorize the use of this statement for financial assessment purposes.**

#### **Asset and Liability Declaration**

| **Asset Type** | **Estimated Value** | **Liability Type** | **Outstanding Balance** |
| --- | --- | --- | --- |
| **Cash Savings** |  | **Credit Card Debt** |  |
| **Investments** |  | **Mortgage** |  |
| **Vehicles** |  | **Car Loan** |  |
| **Retirement Accounts** |  | **Student Loans** |  |
| **Business Equity** |  | **Other Liabilities** |  |
| **Personal Property** |  | **Medical Bills** |  |
| **Home Equity** |  | **Tax Liabilities** |  |
| **Other Assets** |  | **Personal Loans** |  |

#### **Declaration & Signature**

**☐ The above information is correct and accurate.  
 Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_**