**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** |  |  |