

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		