

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:** _____