

PERSONAL BALANCE SHEET

STATEMENT OF FINANCIAL CONDITION AS OF _____ 19, ____

ASSETS		TOTALS	
Cash, checking, & savings			
Marketable securities			
Non-marketable securities			
Real estate owned/home			
Partial interest in real estate equities			
Automobiles			
Personal property			
Personal loans			
Cash value—Life Insurance			
Other Assets—Itemize			
TOTAL ASSETS	A		

LIABILITIES		TOTALS	
Secured loans			
Unsecured loans			
Charge account bills			
Personal debts			
Monthly bills			
Real estate mortgages			
Unpaid income tax			
Other unpaid taxes and interest			
Other debts—Itemize			
TOTAL LIABILITIES	B		
NET WORTH (A minus B=C)	C		
TOTAL LIABILITIES & NET WORTH	D		

DEGREE OF INDEBTEDNESS

Note:

If total liabilities exceed total assets, subtract assets from liabilities to determine degree of indebtedness (B minus A=E)

TOTAL LIABILITIES	B	
TOTAL ASSETS	A	
DEGREE OF INDEBTEDNESS	E	