



PERSONAL FINANCIAL PROFILE

Name:
 Date: March 1, 2015

WHAT I OWN

| ASSET NAME | CURRENT VALUES |
|----------------------------------|----------------|
| Checking Accounts | \$ - |
| Savings Accounts | \$ - |
| Money Market Accounts | \$ - |
| Certificates of Deposit | \$ - |
| Stocks/Bonds/Mutual Funds | \$ - |
| Life Insurance (Cash Value) | \$ - |
| Primary Residence (Market Value) | \$ - |
| Other Real Estate | \$ - |
| Car #1 Resale Value | \$ - |
| Car #2 Resale Value | \$ - |
| Car #3 Resale Value | \$ - |
| Other Personal Property | \$ - |
| IRA's/Retirement Funds/401K | \$ - |
| Other (i.e., Business....) | \$ - |
| Total Assets: | \$ - |

WHAT I OWE

| DEBT NAME | MONTHLY PMT | INTEREST % | TOTAL BALANCE |
|---|-------------|--------------------|---------------|
| Mortgage/Rent | \$ - | | \$ - |
| Add'l Real Estate Loan | \$ - | | \$ - |
| Car Payment | \$ - | | \$ - |
| Car Payment | \$ - | | \$ - |
| Car Payment | \$ - | | \$ - |
| Mortgage & Car Debt Sub-total: | \$ - | | \$ - |
| Credit Cards: | | | |
| | \$ - | | \$ - |
| | \$ - | | \$ - |
| | \$ - | | \$ - |
| | \$ - | | \$ - |
| | \$ - | | \$ - |
| Other Debts: (personal loans, student loans, business debt, medical, legal, IRS, etc.) | | | |
| | \$ - | | \$ - |
| | \$ - | | \$ - |
| | \$ - | | \$ - |
| | \$ - | | \$ - |
| | \$ - | | \$ - |
| | \$ - | | \$ - |
| Credit Cards & Other Sub-total: | \$ - | | \$ - |
| Total Monthly Payments: | \$ - | Total Debt: | \$ - |
| | | NET WORTH: | \$ - |