

File Home Insert Page Layout Formulas Data Review View Add-Ins

Normal Page Layout Full Screen Workbook Views

Page Break Preview Custom Views Show Zoom 100% Zoom to Selection Zoom

New Window Arrange All Freeze Panes Window

Save Workspace Switch Windows Macros

F5 fx

A B C D E F G

1	PERSONAL FINANCIAL STATEMENT					
2	[Name]					
3	[Date]					
4						
5	Assets		Amount in Dollars			
6	Cash - checking accounts	\$		-		
7	Cash - savings accounts			-		
8	Certificates of deposit			-		
9	Securities - stocks / bonds / mutual funds			-		
10	Notes & contracts receivable			-		
11	Life insurance <i>(cash surrender value)</i>			-		
12	Personal property <i>(autos, jewelry, etc.)</i>			-		
13	Retirement Funds <i>(eg. IRAs, 401K)</i>			-		
14	Real estate <i>(market value)</i>			-		
15	Other assets <i>(specify)</i>			-		
16	Other assets <i>(specify)</i>			-		