

# PERSONAL BALANCE SHEET

STATEMENT OF FINANCIAL CONDITION AS OF \_\_\_\_\_

<b>ASSETS</b>	<b>TOTALS</b>	
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	<b>A</b>	

<b>LIABILITIES</b>	<b>TOTALS</b>	
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>B</b>	
NET WORTH (A minus B=C)	<b>C</b>	
TOTAL LIABILITIES & NET WORTH	<b>D</b>	

## DEGREE OF INDEBTEDNESS

Note:			
If total liabilities exceed total assets,	TOTAL LIABILITIES	<b>B</b>	
Subtract assets from liabilities to determine	TOTAL ASSETS	<b>A</b>	
Degree of indebtedness (B minus A=E)	DEGREE OF INDEBTEDNESS	<b>E</b>	