

# *Plymouth Financial Group*

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## **Personal Financial Statement**

Name	Date <u>   </u> / <u>   </u> / <u>   </u>
Street	City State zip
Phone Day	Phone Evening E-Mail

### **Personal Balance Sheet**

<b>ASSETS</b>	<b>LIABILITIES</b>
Cash on hand in Banks \$ _____	Notes Payable \$ _____
US Government Securites \$ _____	Car Payments \$ _____
Loans & Notes Owed \$ _____	Credit Card Debt \$ _____
Cash Value Life Insurance \$ _____	OTHER Liabilities Itemize \$ _____
Value of Business Owned \$ _____	_____ \$ _____
Securities \$ _____	_____ \$ _____
Real Estate \$ _____	_____ \$ _____
OTHER Assets Itemize \$ _____	_____ \$ _____
_____ \$ _____	_____ \$ _____
_____ \$ _____	_____ \$ _____
_____ \$ _____	_____ \$ _____
<b>TOTAL ASSETS</b> \$ _____	<b>TOTAL LIABILITIES</b> \$ _____

**NET WORTH = Total Assets – Total Liabilities = \$ \_\_\_\_\_**

**EXACT - funding sources not listed above, including all details**

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Buyers Name	Date <u>   </u> / <u>   </u> / <u>   </u>
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**The above certifies that this information was provided by him/her and is true and correct**