

PERSONAL FINANCIAL STATEMENT

03/19/25

John Doe  
1313 West 25th Street  
Minneapolis, MN 55405

Soc. Security No.:  
Telephone No.:

Employed by:  
XYZ, Inc.  
1023 South West Street  
Bloomington, MN 55065

Position:  
How long?  
Supervisor  
Telephone:

PREPARER:  
PRESS <F5><f3>  
Range names  
Will Appear in  
Command area  
Select & jump  
to schedules  
for entry

ASSETS		LIABILITIES
Cash in Bank	-	Total Installment Debt
Stocks and Bonds	0	Other Debts
Life Insurance (Cash value)	0	Real Estate Loans
Market Value of Real Estate	0	Automobile Loans
Interest in Retirement Fund	0	Other Liabilities
Net Worth of Business owned	0	
Market value of Autos	0	
Personal Property	0	
Other Assets	0	
	-----	
	0	
Total Assets:	-----	Total Liabilities
	0	
NET WORTH	-----	

ANNUAL INCOME		ANNUAL EXPENDITURES
Salary	0	Real Estate Payments
Spouse's Salary	0	Rent
Income from Securities	0	Estimated Income Taxes
Rental Income	0	Insurance Premiums
Other Income:	0	Property Taxes
1.	0	Health
2.	0	Other: 1.
3.	0	2.
4.	0	3.
	-----	
Total Income	0	Total Expenditures
	-----	
NET CASH INCOME	0	
	-----	

CHECKING AND SAVINGS ACCOUNTS  
Institution and Account No.

Cash

-----

Description	Shares	per Share	Market Value
-------------	--------	-----------	--------------

0

Location	Value	Mortgages	Mortgage Payments
----------	-------	-----------	-------------------

0                      0                      0

Make and Year	Value	Loan	Creditor's Name
2010 Ford Focus	10000	10000	Bank of America
2015 Toyota Camry	15000	15000	Chrysler Financial
2018 Honda Accord	20000	20000	Wells Fargo
2020 Chevrolet Malibu	25000	25000	GM Financial
2022 Tesla Model 3	30000	30000	Tesla Finance

-----

## Page 2

Description	Value
<hr/>	

Total Personal Property	<hr/>
	0
	<hr/>

SCHEDULE OF INSTALLMENT DEBT

Description	Monthly Install.	Unpaid Balance
<hr/>		

Total Installment Debt:	<hr/>	
	0	0
	<hr/>	

.....

-----

0

0

0

0

0

0

0

0

-----

0

-----

-----

-----

0

0

0

0

0

0

0

0

-----

0

-----

Rental Income	Property Taxes
-----	
-----	
0	0
-----	