

Financial Information

Name(s): _____ Date: _____

Residence and other Real Property			
Type (house, condo, rental property etc)	Full Address	Title held by (you, spouse, joint)	Is there a mortgage? (name financial institution)

Personal Property – vehicles, watercraft, snowmobiles, trailers, etc	
Asset Description	Location

Valuables - Collectables, Heirlooms, items of special value, etc	
Asset Description	Location

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Financial Commitments

Rent or Mortgage Payments	Amount _____	Payable to _____
Rent or Mortgage Payments	Amount _____	Payable to _____
Rent or Mortgage Payments	Amount _____	Payable to _____

Outstanding Loans / Lines of Credit / Business Loans / Credit Cards

Lender _____	Amount o/s _____
Lender _____	Amount o/s _____
Lender _____	Amount o/s _____
Lender _____	Amount o/s _____
Lender _____	Amount o/s _____
Lender _____	Amount o/s _____
Lender _____	Amount o/s _____
Lender _____	Amount o/s _____
Lender _____	Amount o/s _____

Other Financial Obligation / Commitments (auto lease, support obligations, donations, etc)

Type		Type	
Payable to		Payable to	
Amount		Amount	
Frequency		Frequency	

Type		Type	
Payable to		Payable to	
Amount		Amount	
Frequency		Frequency	

Type		Type	
Payable to		Payable to	
Amount		Amount	
Frequency		Frequency	

Type		Type	
Payable to		Payable to	
Amount		Amount	
Frequency		Frequency	

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Statement of Net Worth		
Assets	Cost	Fair Market Value
Investment Assets – Bank accts, investments, private company holdings, csv on life insurance, etc		
Personal Assets – Home, cottage, foreign vacation property, vehicles, art, coins, jewelry, etc		
Total Assets	\$	\$
Liabilities	Amount	
Mortgages, loans, lines of credit, credit cards, etc		
Total Liabilities	\$	
Net Worth		\$