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## Personal Asset/Liability Statement

**Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

Real Property Assets		
Property	Market Value	Basis
Primary residence		
Secondary residence		
Rental property		
Investment property		
Other		
Other		
Other		
Other		
<b>Total Real Property</b>	\$ -	

Other Assets	Market Value	Basis
Vehicle 1		
Vehicle 2		
Recreational vehicle 1		
Recreational vehicle 2		
Jewelry		
Furnishings		
Antiques		
Collectibles		
Life insurance cash surrender value		
Loans to friends/family		
Business		
Other		
Other		
Other		
Other		
<b>Total Other Assets</b>	\$ -	

Liabilities				
Short-Term Credit	Balance	Your Monthly Payment	Minimum Monthly Payment	Interest Rate
Credit card 1				
Credit card 2				
Credit card 3				
Loans from friends/family				
Home line of credit				
Other				
<b>Total Short-Term Credit</b>	\$ -		\$ -	

Loans & Mortgages (principal & interest only - do not include escrow)				
	Balance	Your Monthly Payment	Minimum Monthly Payment	Interest Rate
Primary residence				
Secondary residence				
Rental property				
Investment property				
Vehicle 1				
Vehicle 2				
Recreational vehicle 1				
Recreational vehicle 2				
Student loans				
Business loans				
401(k) loan				
Other				
Other				
Other				
Other				
<b>Total Loans &amp; Mortgages</b>	\$ -		\$ -	

Other Liabilities				
	Balance	Your Monthly Payment	Minimum Monthly Payment	Interest Rate
Commitment to donate				
Other 1				
Other 2				
Other 3				
<b>Total Other Liabilities</b>	\$ -		\$ -	

*If they are available, please provide statements in lieu of (or in addition to) entering items on this worksheet.*