

**What
are
you
worth...**



**Family
Investors
Company**

265 South Avenue
Fanwood, New Jersey 07023
Phone (908) 322-1800

Client Name

Date

Family Investors Company

Personal Financial Statement

NET WORTH SUMMARY

Assets:

Residence	\$
Savings <small>(money markets, credit unions, C.D.'s)</small>	\$
Checking Accounts	\$
Securities <small>(stocks, bonds, unit trusts, mutual funds)</small>	\$
Automobiles	\$
Personal Property <small>(antiques, furs, jewelry)</small>	\$
Real Estate Property	\$
Retirement <small>(IRA, 401k, annuities)</small>	\$
Other Assets	\$

Liabilities:

Mortgages	\$
Home Equity Loan	\$
Car Loan	\$
Credit Card	\$
Other Debts	\$

Total Assets \$

Total Liabilities \$

Total Assets	\$
– Total Liabilities	\$
Net Worth	\$

MONTHLY INCOME-EXPENSE STATEMENT

Net Monthly Income:

Salary and Bonuses	\$
Interest	\$
Dividends	\$
Alimony/Child Support	\$
Other Income <small>(pension, disability, social security)</small>	\$

Monthly Expenses:

Household <small>(food, utilities, mortgage, medical, education, recreation, personal)</small>	\$
Taxes	\$
Insurance Premiums	\$
Savings/Investments	\$
Loan Repayments	\$
Other Expenses	\$

Total Monthly Net Income \$

Total Monthly Expenses \$

Total Monthly Net Income	\$
– Total Monthly Expenses	\$
Spendable Balance	\$