

Detailed Personal Finance Statement

Name

1. ASSETS - Details

Notes and Contracts held

From Whom Owing	Balance Owing	Original Amount	Original Date	Monthly Payment	Maturity Date	History / Purpose
	£ -	£ -		£ -		

Securities: stocks / bonds / mutual funds

Name of Security	Number of Shares	Cost	Market Value	Date of Acquisition
		£ -	£ -	

Stock in Privately Held Companies

Company Name	No. of shares	£ Invested	Est. Market Value
		£ -	£ -

Property

Description / Location	Market Value	Amount Owning	Original Cost	Purchase Date
	£ -	£ -	£ -	

2. LIABILITIES - Details**Credit Card & Charge Card Debt**

Name of Card / Creditor	Amount Due
	£ -

Notes Payable (excluding monthly bills)

Name of Creditor	Amount Owning	Original Amount	Monthly Payment	Interest Rate	Secured by (Leine)
	£ -	£ -	£ -		

Mortgage / property Loans Payable

Name of Creditor	Amount Owning	Original Amount	Monthly Payment	Interest Rate	Secured by (Leine)
	£ -	£ -	£ -		