Personal Financial Statement

Each owner must submit this form.

LEVEL ESQ

Applicant name _____

Assets		Liabilities	
Cash in Checking……..	$ _____	Mortgage……..…….…	$ _____
Savings Accounts…….	$ _____	Home Equity Loan or Line of Credit…….	$ _____
Money Market Accounts……..	$ _____	Other Real Estate Loans……..……..	$ _____
Market Value of Your Home……	$ _____	Auto Loan or Lease……..……	$ _____
Other Real Estate……. *(i.e., investment/rental property, timeshare, vacation home)*	$ _____	Credit Card Balances……..…….	$ _____
Stocks…….……	$ _____	Student Loans……...	$ _____
Bonds…….	$ _____	Delinquent Taxes……..…	$ _____
Mutual Funds…..……..	$ _____	401 (k) Loan……..	$ _____
Market Value of Vehicles……..…. *(estimated; check www.kbb.com)*	$ _____	Personal Loans…….	$ _____
Life Insurance……..……. *(Cash Value if applicable)*	$ _____	Life Insurance..…….	$ _____
Current Value of 401 (k) or Similar Retirement…... Account	$ _____	Other……...…….	$ _____
Individual Retirement Account……..……. *(IRA, Roth IRA)*	$ _____		
Other Assets……..……..…….	$ _____		
Description of other assets if included: _____			
_____			
_____			
_____			

INTERNAL USE – TO BE COMPLETED BY LevelESQ OFFICE STAFF	
Total Assets…….	$ _____
Total Liabilities……..	$ _____
NET WORTH……. *(Assets minus Liabilities)*	$ _____