

# PERSONAL FINANCIAL STATEMENT



New York  
Women Executives  
in Real Estate

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

SSN: (optional) \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Tel (H): \_\_\_\_\_ Tel (W): \_\_\_\_\_

Employer: \_\_\_\_\_ Annual Compensation: \_\_\_\_\_

Are you eligible to receive reimbursement from your employer for tuition owed and paid to your school?

Yes  No

If yes, percentage of tuition eligible for reimbursement: \_\_\_\_\_

## ASSETS Note: List all assets at current Value

## LESS: LIABILITIES and DEBTS

1. Accounts \_\_\_\_\_ \$ \_\_\_\_\_  
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1. Notes Payable, Bank Debt, Mortgage Obligation \$ \_\_\_\_\_

2. Stocks, Bonds—Money Market \_\_\_\_\_ \$ \_\_\_\_\_  
Securities Accounts \_\_\_\_\_ \$ \_\_\_\_\_

2. Credit Card Debt & Current Obligations (Rent) \$ \_\_\_\_\_

3. Mortgage Receivable \_\_\_\_\_ \$ \_\_\_\_\_  
Notes Receivable \_\_\_\_\_ \$ \_\_\_\_\_  
Loans Receivable \_\_\_\_\_ \$ \_\_\_\_\_

3. Educational Loan Debt \$ \_\_\_\_\_  
(Include debt family may have taken out for tuition on your behalf)

4. Investments in Real Estate, (E.G. Home, Residence, Business Use, Investment Use) \_\_\_\_\_ \$ \_\_\_\_\_

4. Auto Loan, Lease Obligations \$ \_\_\_\_\_

5. Pensions, Annuities, Trust Benefits, 401(K), IRA Plans, etc. \_\_\_\_\_ \$ \_\_\_\_\_

5. Current Tax Obligations \$ \_\_\_\_\_

6. Life Insurance Value \_\_\_\_\_ \$ \_\_\_\_\_

**6. Total Liabilities and Debt \$ \_\_\_\_\_**

7. Miscellaneous Assets \_\_\_\_\_ \$ \_\_\_\_\_  
(E.G. Autos, Collectibles, Antiques, Other)

**8. Total Assets \$ \_\_\_\_\_**

**Net Worth**

**\$ \_\_\_\_\_**

I, \_\_\_\_\_ (name of applicant) certify that this Financial Statement is true and correct.

Certified by \_\_\_\_\_ Date \_\_\_\_\_  
(Applicant)