

## PERSONAL NET WORTH STATEMENT

NAME: \_\_\_\_\_

PRIVATE ADDRESS: \_\_\_\_\_  
\_\_\_\_\_

POST CODE: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_

### VALUE OF ASSETS:

ABOVE PROPERTY: JOINTLY OWNED: YES/NO £ \_\_\_\_\_

STOCKS AND SHARES £ \_\_\_\_\_

ANY OTHER PROPERTY £ \_\_\_\_\_

CAR(S) £ \_\_\_\_\_

CURRENT ACCOUNT(S) £ \_\_\_\_\_

BUILDING SOCIETY/INVESTMENT ACCOUNTS £ \_\_\_\_\_

BONDS/PEPS/TESSAS ETC: £ \_\_\_\_\_

TOTAL ASSETS £ \_\_\_\_\_

### LIABILITIES:

MORTGAGE BALANCE(S): £ \_\_\_\_\_

BANK LOANS/OVERDRAFTS: £ \_\_\_\_\_

OTHER LOANS: £ \_\_\_\_\_

CREDIT CARD BALANCES: £ \_\_\_\_\_

BALANCE DUE UNDER GUARANTEE(S): £ \_\_\_\_\_

TOTAL LIABILITIES: £ \_\_\_\_\_

**PERSONAL NET WORTH:** £ \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_