

YOUR PERSONAL **FINANCIAL** STATEMENT

ASSETS		LIABILITIES	
Cash and Cash Equivalents		Loans and Debt	
CHECKING ACCOUNTS		MORTGAGES	
SAVINGS ACCOUNTS		CAR LOANS	
MONEY MARKET ACCOUNTS		CREDIT CARDS	
TOTAL CASH AND CASH EQUIVALENTS		HELOC	
Investments		PERSONAL LOANS	
STOCKS/BONDS/MUTUAL FUNDS		STUDENT LOANS	
RETIREMENT ACCOUNTS		TOTAL CASH AND CASH EQUIVALENTS	
TOTAL INVESTMENTS		Other Liabilities	
Real Estate		PAST FEDERAL TAXES DUE	
PRIMARY RESIDENCE		PAST STATE TAXES DUE	
RENTAL PROPERTY		PAST LOCAL TAXES DUE	
INVESTMENT REAL ESTATE		TOTAL OTHER LIABILITIES	
TOTAL REAL ESTATE		TOTAL LIABILITIES	
Personal Property		NET WORTH	
ART WORK/JEWELRY			
CAR #1			
OTHER PERSONAL PROPERTY			
TOTAL PERSONAL PROPERTY			
Business Interests			
BUSINESS			
TOTAL BUSINESS INTERESTS			
Intangible Assets			
STOCK OPTIONS			
INTELLECTUAL PROPERTY			
VESTED PENSIONS			
TOTAL ASSETS			

This is your life statement. Who am I today and who do I aspire to be?

**SOULFUL
VALUES**

**PERSONAL
LIFE
STATEMENT**

YOUR PERSONAL **LIFE** STATEMENT

ACCOMPLISHMENTS

Personal Accomplishments

DEGREES	
CERTIFICATIONS	
PROFESSIONAL EXPERIENCES	
LEADERSHIP EXPERIENCE	
VOLUNTEER ROLES	
COMMUNITY/LARGER CAUSES	

TOTAL ACCOMPLISHMENTS

Personal Intangible Assets

RELATIONSHIPS - PERSONAL	
RELATIONSHIPS - EXTENDED FAMILY	
ENGAGEMENT - COMMUNITY	
ENGAGEMENT - SPIRITUAL	
HEALTH - PHYSICAL	
HEALTH - MENTAL	
INTELLECTUAL PURSUITS	
PASSION PROJECTS	

TOTAL PERSONAL INTANGIBLE ASSETS

WHAT'S AHEAD

Personal Accomplishments

DEGREES	
CERTIFICATIONS	
PROFESSIONAL EXPERIENCES	
LEADERSHIP EXPERIENCE	
VOLUNTEER ROLES	
COMMUNITY/LARGER CAUSES	

TOTAL CASH AND CASH EQUIVALENTS

Personal Intangible Assets

RELATIONSHIPS - PERSONAL	
RELATIONSHIPS - EXTENDED FAMILY	
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TOTAL PERSONAL INTANGIBLE ASSETS

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