

PERSONAL ASSET HOLDINGS STATEMENT

Statement of Financial Position

Full Name:

Statement Date:

Address:

Phone Number:

| ASSET DESCRIPTION / INSTITUTION NAME | ACCOUNT / REFERENCE NO. | CURRENT MARKET VALUE (\$) |
|--|-------------------------|---------------------------|
| 1. Cash & Cash Equivalents (Savings, Checking, CDs) | | |
| | | |
| | | |
| | | |
| 2. Investment Portfolios (Stocks, Bonds, Mutual Funds, ETFs) | | |
| | | |
| | | |
| | | |
| 3. Retirement Holdings (IRA, 401k, Pension Plans) | | |
| | | |
| | | |
| 4. Real Estate Properties (Residential, Commercial, Land) | | |
| | | |
| | | |
| 5. Other Personal Assets (Vehicles, Business Equity, Valuables) | | |
| | | |
| | | |
| TOTAL ESTIMATED ASSETS: | | |

I hereby certify and declare that the information provided in this Personal Asset Holdings Statement is true, accurate, and

complete to the best of my knowledge as of the date specified above.

Signature of Declarant

Date