

BREAKING BONDS

Personal Financial Statement

NAME:

DATE:

CONTACT US

✉ info@breakingbonds.com

☎ T: (615)330-3572

🌐 www.breakingbonds.com

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ASSETS

Assets	Current Value Total
Checking accounts	
Saving accounts	
Credit union accounts	
Money markets	
Certificates of deposit	
Savings bonds	
Bond certificates	
Stock certificates	
Dividend reinvestment plans	
Brokerage statements	
Individual retirement accounts (IRAs), simplified employee pension (SEP) IRAs, and Roth IRAs	
Pension plans and profit-sharing plans	
401(k) plans	
Non-qualified deferred compensation plans	
Stock purchase plans	
Stock option or restricted stock plans	
Business interests (contracts or ownership)	
Health savings account balances	
Loans or promissory notes owned by you or your husband	
Lawsuits filed by you or your husband	
Potential claims (filed and not yet filed), including small claims as well as other lawsuits, regardless of court venue, over benefits such as disability and social security, insurance claims, and more	
Annuities	
Life insurance (type, face amount, owner, beneficiary, premiums)	
Health, dental, vision, and disability insurance	
Trusts	
Inherited assets or gifts	
Motor vehicles (cars, trucks, RVs, boats, motorcycles, and so on)	
Real property (home, vacation home, rental, unimproved, commercial)	
Timeshare interests	
Leases	



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ASSETS

Assets	Current Value Total
Receivables	
Livestock inventories	
Patents, copyrights, trademarks, and royalties	
Creative works, both in progress and completed	
Cemetery plots	
Frequent flier accounts, airline and hotel rewards, credit card points	
Club memberships (country, social, dinner, sports, and fitness)	
Antiques, collectibles, and collections (note if a gift, owned before marriage, or inherited)	
Equipment (sporting, electronic, and hobby related)	
Firearms	
Furs	
Jewelry (note if a gift, owned before marriage, or inherited)	
Safe deposit box contents	
Storage facilities	
Home furnishings and appliances (note if a gift, owned before marriage, or inherited)	
Expected tax refunds or other refunds	
Accrued vacation benefits	
Expected inheritances	
Assets held by others	
Total	



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LIABILITIES

Liabilities	Current Value Total
Mortgages	
Auto loans	
Credit card debt	
Margin loans or security-based loans on brokerage accounts	
Loans against 401(k)	
Student loans debt	
Other loans or promissory notes	
Payables: Debts owed by a business, whether incorporated, sole proprietorship, or a limited liability company (LLC). This includes payroll, income and social security taxes, money owed for supplies, inventory purchases, and so on	
Tax liens, overdue and currently owed taxes	
Pending lawsuits against you	
Total	
TOTAL NET VALUE	

For more resources and tools to help you navigate an abusive divorce, visit BreakingBonds.com. Breaking Bonds is a free resource that provides the critical tools and insight for those experiencing an abusive divorce from their spouse.

Stay connected for updates.



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