

White Earth Investment Initiative

407 East Main St, PO Box 38

Ogema, MN 56569

Personal Financial Statement

Name: _____
FULL NAMES WITH MIDDLE INITIAL

Address: _____

City State, Zip: _____

Home # _____ **Work #** _____

Fax # _____ **Email** _____

Date: _____

1. Checking Accounts

Bank				Balance	
Total Value				0	

2. Savings Accounts and Certificates of Deposit

Bank	Savings or CD			Balance	
Total Value				0	

3. Notes and Contracts held

From Whom Owing	Original Amount	Original Date	Monthly Payment	Balance Due to You	Maturity Date
Total Value				0	

4. Retirement Funds IRA, 401(k), etc.

Company, Bank, Broker	Dollars Invested	Percent Vested	Current Value
Total Value			0

5. Securities: stocks / bonds / mutual funds

Name of Security	Number of Shares	Cost	Market Value	Date of Acquisition
Total Value			0	

6. Stock in Privately Held Companies

Company Name	No. of shares	Dollars Invested	Est. Market Value
Total Value			0

7. Life Insurance

Company Name	Benneficiary	Death Benefit	Cash Value	Term
Total Value			0	

8. Real Estate

Description / Location	Purchase Date	Original Cost	Market Value
Total Value			0

ITEMIZATION OF LIABILITIES

11. Credit Card Debt

Name of Card		Monthly Payment	Maximum Available	Current Balance
Total Debt				0

12. Notes Payable (vehicles, student loans, boat, etc., exclude monthly bills)

Name of Creditor	Original Amount	Monthly Payment	Current Balance	Secured by
Total Debt			0	

13. Taxes Payable

Taxing Agency	Description		Balance Due
Total Debt			0

14. Real Estate Mortgages

Property Address	Mortgage Holder	Original Amount	Current Balance	Monthly Payment
Total Debt			0	

15. Other Liabilities

Description	Original Amount	Monthly Payment	Current Balance	Secured by
Total Debt			0	

