

Personal Financial Statement

Date: [Insert Date]

To Whom It May Concern,

I am writing to provide my personal financial statement for the purpose of tax preparation for the year ending [Insert Year]. Below is a summary of my financial information:

Assets

- Cash and Cash Equivalents: \$[Insert Amount]
- Investments: \$[Insert Amount]
- Real Estate: \$[Insert Amount]
- Personal Property: \$[Insert Amount]

Liabilities

- Mortgage: \$[Insert Amount]
- Credit Card Debt: \$[Insert Amount]
- Other Loans: \$[Insert Amount]

Net Worth

Net Worth: \$[Insert Amount]

If any additional information is needed, please feel free to contact me at [Insert Contact Information].

Sincerely,

[Your Name]

[Your Address]

[Your Phone Number]

[Your Email Address]