

PERSONAL FINANCIAL STATEMENT

Prepared for Sarah J. Mitchell As of 06/01/2026

Full Name	Sarah J. Mitchell	Phone	(512) 555-0142
Email	demo@formstacklegal.com	Occupation	
Business / Employer		Statement Date	06/01/2026
Address	1234 Sample Street	City	Austin
State	Texas	ZIP	

ASSETS

Description	Amount
Cash & equivalents	
Chase Checking	\$45,000.00
Vanguard Brokerage	\$215,000.00
<i>Subtotal Cash & equivalents</i>	\$260,000.00
Retirement	
401(k) — Fidelity	\$380,000.00
<i>Subtotal Retirement</i>	\$380,000.00
Real estate	
Primary residence (12 Oak Ln)	\$720,000.00
<i>Subtotal Real estate</i>	\$720,000.00
Vehicles	
2023 Toyota Highlander	\$38,000.00
<i>Subtotal Vehicles</i>	\$38,000.00
Business interests	
Mitchell Consulting LLC equity	\$165,000.00
<i>Subtotal Business interests</i>	\$165,000.00
Total Assets	\$1,563,000.00

LIABILITIES

Description	Amount
Mortgages	
Mortgage — Wells Fargo	\$412,000.00
<i>Subtotal Mortgages</i>	\$412,000.00
Installment loans	

Auto loan	\$18,500.00
<i>Subtotal Installment loans</i>	\$18,500.00
Revolving credit	
Credit cards	\$4,200.00
<i>Subtotal Revolving credit</i>	\$4,200.00
Business debt	
Business LOC	\$35,000.00
<i>Subtotal Business debt</i>	\$35,000.00
Total Liabilities	\$469,700.00

NET WORTH (Assets – Liabilities)

\$1,093,300.00

I certify that the information provided in this Personal Financial Statement is true, complete, and accurate to the best of my knowledge. I authorize the recipient to verify this information as needed for credit and lending decisions.

Signature

Date