

Personal Financial Statement

The AIB "Personal Financial Statement" makes it easy to balance all your assets and financial obligations, to arrive at a clear picture of your current financial profile.

For an accurate statement, do include information on any joint borrowings or savings. While some categories listed below may not be relevant to you, just fill in those that are and the statement will reflect your situation.

ESTIMATED CURRENT VALUE OF FAMILY HOME €

Mortgage

Mortgage Purpose	Lender	Monthly Payments	Amount Outstanding	Arrears (if available)
Principal Mortgage				
Top Up				
Equity Release				
Buy To Let / Investment				
Other				
TOTAL 1		€	€	€

Personal Loans

Loan Purpose	Lender	Monthly Payments	Amount Outstanding	Arrears (if available)
Car				
Furniture				
Holiday				
Credit Union				
Other				
TOTAL 2		€	€	€

Credit Cards

Card Type	Lender	Monthly Payments	Amount Outstanding	Arrears (if available)
Visa				
Mastercard				
Store Card				
Other				
TOTAL 3		€	€	€

Additional Debts

Dept Type	Lender	Monthly Payments	Amount Outstanding	Arrears (if available)
Overdraft				
Long Term				
Family Loan				
Other				
TOTAL 4		€	€	€

Total Debt Outstanding

Loan Type	Total Monthly Repayments	Total Amounts Outstanding
Mortgage TOTAL 1		
Personal Loan TOTAL 2		
Credit Card TOTAL 3		
Additional Debt TOTAL 4		
TOTAL	€	€

Savings Accounts

Financial Institution	Balance
AIB	
Other Bank	
Post Office	
Credit Union	
TOTAL	€

Shares

Company Name	Number of Shares	Current Value of Shares
TOTAL		€

Long Term Savings

Details (e.g. 5 Year Bond, 3 Year Savings Plan)	Balance
TOTAL	€

Life Assurance Policy

Policy Held	Name of Company	Amount Covered	Amount of Annual Premium
Mortgage Cover			
Additional Life Cover			
Other			
TOTAL	€	€	€

Pension Plan

Pensions Held	Name of Company	Balance	Amount of Annual Premium
Company Pension			
Additional Pension			
Other			
TOTAL	€	€	€

Date: _____