



**Biblical Principles Inc.**  
**Personal Data Tool**

September 25, 2002  
 Revised May 29, 2003

Date \_\_\_\_\_  
**(Form 1)**

When this form is prepared for a counseling session with a Biblical Principles representative, please fill in the faith statement section. This form is designed for counseling sessions or for personal use.

Husband Name & Occupation: \_\_\_\_\_

Wife Name & Occupation: \_\_\_\_\_

Name(s) and Age(s) of Minor Children: \_\_\_\_\_

**Brief Faith Statement for Each Adult:** \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Financial Statement**

<b>Assets</b>		<b>Liabilities</b>	
Liquid Assets ( Cash, Checking, and Savings)		Liabilities (All Type Loans and Credit Card Debt)	
<u>Description</u>	<u>Amount</u>	<u>Description</u>	<u>Amount</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Total Liquid Assets	_____	_____	_____
Use Assets (Home, Autos, Personal Possessions)		_____	_____
<u>Description</u>		_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Total Use Assets	_____	Total Liabilities	_____
Invested Assets (Securities, IRAs, 401Ks, CDs, Other)		<b>Net Worth</b>	
<u>Description</u>		(Total Assets minus Total Liabilities)	
_____	_____	_____	
_____	_____	<b>Status of Will</b>	
_____	_____	No Will	
Total Invested Assets	_____	Have Will, Needs Updating	
Total Assets	_____	Have Will, Update Current	
		Executor Name _____	
		Will Storage Location _____	
		Guardian Name _____	
		(If Applicable)	

**Health Insurance Status:** Adults \_\_\_\_\_  
 Children \_\_\_\_\_

**Life Insurance Status:** Husband: Type \_\_\_\_\_ Amount \_\_\_\_\_ Wife: Type \_\_\_\_\_ Amount \_\_\_\_\_  
 Children: Type \_\_\_\_\_ Amount \_\_\_\_\_

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Note 2. Biblical Principles Inc. representatives are ministers, and expressly are not professional financial advisers, accountants, tax experts or any other type professional adviser.

Note 3. This form may be downloaded from [www.biblicalprinciplesinc.org](http://www.biblicalprinciplesinc.org) .

*Blessed Is The Man Who Finds Wisdom*