

FINANCIAL STATEMENT STRICTLY CONFIDENTIAL

Name _____
 Street Address _____
 City _____ State _____ Zip Code _____

Assets	
Cash on Hand and in Banks	\$
Government Securities	-
Accounts, Loans and Notes Receivable	
Cash Surrender Value Life Insurance	
Value of Businesses Owned	
Other Stocks and Bonds	
Real Estate	
Automobiles-Number ()	
Household Furnishings and Personal Effects	
Other Assets (Itemize)	
TOTAL ASSETS \$	
Liabilities and Net Worth	
Notes Payable	\$
Liens on Real Estate	
Other Liabilities (Itemize)	
TOTAL LIABILITIES \$	
NET WORTH \$	
Source of Income	
Salary	\$
Dividends and Interest	
Bonus and Commissions	
Real Estate Income	
Other Income	
TOTAL INCOME \$	

The undersigned certifies that this information was provided by him/her and is true and correct.

Date _____

Signature _____ Home Phone _____