

FINANCIAL STATEMENT STRICTLY CONFIDENTIAL



Name: _____

Street: _____

City: _____ **State:** _____ **Zip Code:** _____

Assets

Cash on Hand and in Banks	\$
U.S. 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 Furnishing and Personal Effects	
Other Assets (itemized)	

Total Assets \$

Liabilities and Net Worth

Notes Payable	\$
Liens on Real Estate	
Other Liabilities (Itemized)	

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 and is true and correct.

Date: _____ **Signature:** _____ **Home Phone:** _____