

**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	
<b>Total Income</b>	<b>\$</b>

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

Date: \_\_\_\_\_ Signature: \_\_\_\_\_ Home Phone: \_\_\_\_\_