



## CONFIDENTIAL FINANCIAL STATEMENT

Name: \_\_\_\_\_ Spouse: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Mobile/Cell Phone: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

**Liabilities and Net Worth**

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 Furnishings and Personal Effects	
Other Assets (itemize)	
<b>Total Assets:</b>	<b>\$</b>

**Liabilities and Net Worth**

Notes Payable	\$
Liens on Real Estate	
Other Liabilities (itemize)	
<b>Total Liabilities</b>	<b>\$</b>
<b>Net Worth:</b>	<b>\$</b>

**Source of Income**

Salary	\$
Spouse	
Dividends and Interest	
Bonus and Commissions	
<b>Total Income:</b>	<b>\$</b>

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

Date: \_\_\_\_\_ Signature: \_\_\_\_\_