



CONFIDENTIAL PERSONAL FINANCIAL STATEMENT

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Assets

Cash on Hand and in Banks	\$
Accounts, Loans and Notes Receivable	\$
Value of Businesses Owned	\$
Stocks, Bonds, and U.S. Gov't Securities	\$
Real Estate-Residence	\$
Real Estate- Investment	\$
Automobile - Number ()	\$
Household Furnishings and Personal Effects	\$
IRA, SEP-IRA, 401k, etc.	\$
Other Assets (Itemize)	\$
Total Assets	\$ _____

Liabilities and Net Worth

Credit Card Balances and Notes Payable	\$
Loans on Real Estate-Residence	\$
Loans on Real Estate- Investment	\$
Automobile Loan Balance	\$
Other Liabilities (Itemize)	\$
Total Liabilities	\$ _____
Net Worth	\$ _____

Source of Income

Salary	\$
Bonus and Commissions	\$
Dividends and Interest	\$
Real Estate Investments Income	\$
Other Income	\$
Total Income	\$ _____

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

Date: _____ Signature: _____