

Financial Statement

STRICTLY CONFIDENTIAL

Name: _____ Street Address: _____

City: _____ State: _____ Zip: _____

Assets

Cash on Hand In Banks	\$
U.S. Government Securities	
Accounts, Loans and Notes Receivable	
Cash Surrender Value of Life Insurance	
Value of Business 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 \$

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: _____

Name: _____