

# 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: \_\_\_\_\_