

Confidential Financial Statement

Name:

Address:

City, State, Zip

Home Phone

Cell Phone

Assets

Cash on Hand In Banks (Include checking, savings and other accessible cash)
Retirement Accounts (401K's, etc.)
Accounts, Loans and Notes Receivable
Cash Surrender Value of Life Insurance
Value of Business Owned
Publicly Traded Stocks and Bonds
Real Estate
Automobiles
Household Furnishings and Personal Effects
Other Assets

TOTAL ASSETS

Liabilities and Net Worth

Notes Payable (Auto's, personal debt & other loans)
Liens on Real Estate
Other Liabilities (Credit cards, college loans, etc.)

TOTAL LIABILITIES

NET WORTH

Source of Income

Salaries (Include total household income)
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 as of:

Signature or Typed Name