

Personal Financial Statement

STRICTLY CONFIDENTIAL

Name: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Assets

Cash on Hand In Banks	
U.S. Government Securities	
Retirement Funds - IRA's; 401K's	
Accounts, Loans and Notes Receivable	
Cash Surrender Value of Life Insurance	
Value of Business Owned	
Stocks and Bonds - fair market value	
Real Estate	
Automobiles - Number ()	
Household Furnishings and Personal Effects	
Other Assets	

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.

Signature: _____ Date: _____

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