



3292 Thompson Bridge Road, Suite 352
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Confidential Financial Statement

Name(s): _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Assets

Cash on Hand in Banks	_____
U.S. Government Securities	_____
Accounts, Loans, and Notes Receivable	_____
Cash Surrender Value Life Insurance	_____
Value of Business Owned	_____
Listed Stocks and Bonds	_____
Privately-held Stocks & Bonds	_____
House (Market Value)	_____
Automobile (Number _____)	_____
Household Furnishings and Personal Effects	_____
Real Estate (Other than House)	_____
Other Assets (Itemize)	_____
TOTAL ASSETS	\$ _____

Liabilities and Net Worth

Notes Payable	_____
Loan on House	_____
Liens on Real Estate	_____
Credit Card Debt (over 30 days)	_____
Other Liabilities (Itemize)	_____
TOTAL LIABILITIES	\$ _____
NET WORTH	\$ _____

Source of Income

Salary	_____
Dividends and Interest	_____
Bonus and Commissions	_____
Real Estate Income	_____
Other Income	_____
TOTAL INCOME	\$ _____

The undersigned certifies that he/she provided this information and it is true and correct.

Signature: _____ Date: _____ Home Phone: _____