

**Personal Financial Statement
Strictly Confidential**

Name: _____ Home Tel#: _____
 Address: _____ Mobile Tel#: _____
 City: _____ State: _____ Zip: _____

ASSETS

Available Cash	\$
Marketable Securities	
Accounts, Loans and Notes Receivable	
Residence Real Estate Value	
Other Real Estate Value	
Fair Market Value of Business	
Automobiles - Number ()	
Household Furnishings and Personal Effects	
IRA, Pension and Profit and 401K	
Other Assets (Itemize)	

Total Assets: \$ _____

LIABILITIES

Notes Payable	\$
Credit Cards Payable	
Residence Real Estate Mortgage	
Other Liabilities (Itemize)	

Total Liabilities: \$ _____

Net Worth (Assets Minus Liabilities): \$ _____

SOURCES 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 them and is true and correct.

Signature: _____ Date: _____