

**Financial Statement- Strictly Confidential**

Name: \_\_\_\_\_ - Phone: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ - State: \_\_\_\_\_ - Zip Code: \_\_\_\_\_

**ASSETS**

Cash on Hand in Banks . . . . .	\$	_____
U.S. Government Securities. . . . .	\$	_____
Accounts, Loans and Notes Receivable . . . . .		_____
\$		_____
Cash Surrender Value of Life Insurance . . . . .		_____
\$		_____
Value of Businesses Owned . . . . .	\$	_____
Other Stocks and Bonds . . . . .	\$	_____
Real Estate . . . . .	\$	_____
Automobiles – Number _____ ) . . . . .	\$	_____
( _____		_____
Household Furnishings and Personal Effects . . . . .		_____
\$		_____
<u>Other Assets Itemized Below:</u>		_____
_____	\$	_____
_____	\$	_____

**TOTAL ASSETS** \$ \_\_\_\_\_

**LIABILITIES**

Notes Payable . . . . .	\$	_____
Liens on Real Estate . . . . .	\$	_____
<u>Other Liabilities Itemized Below:</u>		_____
_____	\$	_____
_____	\$	_____

**TOTAL LIABILITIES** \$ \_\_\_\_\_

**NET WORTH**

**TOTAL ASSETS - TOTAL LIABILITIES** \$ \_\_\_\_\_

**SOURCE OF INCOME**

Salary . . . . .	\$	_____
Dividends and Interest . . . . .	\$	_____
Bonus and Commissions . . . . .	\$	_____
Real Estate Income . . . . .	\$	_____
Other Income: _____	\$	_____

**TOTAL INCOME** \$ \_\_\_\_\_

It is understood that this information will be held in strict confidence by the Broker, its agents and officers. The undersigned certifies that this information is true and correct.

Signature: \_\_\_\_\_ -Date: \_\_\_\_\_