

FINANCIAL STATEMENT - STRICTLY CONFIDENTIAL

Name _____ Tel _____

Address _____

City _____ State _____ Zip Code _____

ASSETS

Cash on Hand and in Banks \$ _____
U.S. Government Securities \$ _____
Accounts, Loans, and Notes \$ _____
Life Insurance \$ _____
Value of Businesses Owned \$ _____
Other Assets Stocks and Bonds \$ _____
401K & Contributory Retirement Cash Value \$ _____
Real Estate \$ _____
Automobiles (value) –Number _____ \$ _____
Personal Effects \$ _____

TOTAL ASSETS \$ _____

LIABILITIES

Notes Payable \$ _____
Liens on Real Estate \$ _____
Other Liabilities Itemized Below
Home Equity/ Automobiles \$ _____
Master Card / Visa \$ _____

TOTAL LIABILITIES \$ _____

SOURCE OF INCOME

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

TOTAL INCOME \$ _____

Signature Date

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.