

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: \_\_\_\_\_