

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

\$ _____

Other Assets Itemized Below: _____

_____ \$ _____

_____ \$ _____

TOTAL ASSETS \$ _____

LIABILITIES

Notes Payable \$ _____

Liens on Real Estate \$ _____

Other Liabilities Itemized Below: _____

_____ \$ _____

_____ \$ _____

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: _____