

Financial Information

Assets

Cash on hand and in banks	\$
U.S Government Securities	
Other Stocks and Bonds	
Accounts, Loans and Notes Receivable	
IRA/s, 401(k)	
Cash Surrender Value Life Insurance	
Value of Businesses Owned	
Other Stocks and Bonds	
Real Estate	
Automobiles – Number ()	
Household Furnishings and Personal Effects	
Other	

Total Assets \$

Liabilities and Net Worth

Notes Payable	\$
Liens on Real Estate	
Other Liabilities (Itemize)	

Total Liabilities \$
Net Worth \$

Source of Income

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

Total Income \$

The undersigned certifies that this information is true and correct.

Name: _____

Print

Signature _____

Date: _____