

**PERSONAL FINANCIAL INFORMATION  
STRICTLY CONFIDENTIAL**

Name \_\_\_\_\_

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

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Social Security # \_\_\_\_\_ Home Number \_\_\_\_\_

**Assets**

Cash on Hand and in Banks	\$
U.S. Government Securities	
Account, Loans and Notes Receivable	
Cash surrender Value of Life Insurance	
Value of Businesses owned	
Other Stocks and Bonds	
Real Estate	
Automobile - Number ( )	
Household Furnishings and Personal Effects	
Other Assets (Itemize)	

**Total Assets** \$ \_\_\_\_\_

**Liabilities and Net Worth**

Notes Payable	\$
Liens on Real Estate	
Other Liabilities	

**Total Liabilities** \$ \_\_\_\_\_

**Net Worth** \$ \_\_\_\_\_

**Source of Income**

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

**Total Income** \$ \_\_\_\_\_

The undersigned certifies that this information was provided by him/her and is true and correct.

Signature \_\_\_\_\_ Date \_\_\_\_\_