

# Personal Financial Info

**CONFIDENTIAL**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Social Security #: \_\_\_\_\_ Home Phone: \_\_\_\_\_

**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 Assests: \$ \_\_\_\_\_

**LIABILITIES & NET WORTH**

Notes Payable	\$
Liens on Real Estate	
Other Liabilities	

Total Liabilities: \$ \_\_\_\_\_

Net Worth: \$ \_\_\_\_\_

**SOURCE OF INCOME**

Salary	\$
Dividends & 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: \_\_\_\_\_