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**FINANCIAL STATEMENT**  
**STRICTLY CONFIDENTIAL**

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

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 - Itemize:	

**Total Assets \$**

**Liabilities and Net Worth:**

Notes Payable	\$
Liens on Real Estate	
Other Liabilities - Itemize:	

**Total Liabilities \$**

**Source of Income:**

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

**Total Income \$**

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

Print Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Home Phone: \_\_\_\_\_