



CONFIDENTIAL NET WORTH STATEMENT

Name(s): _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Assets

| | | |
|--|-----------|--|
| Cash on Hand and in Banks..... | \$ | |
| U.S. Government Securities | | |
| Accounts, Loans, and Notes Receivable | | |
| Cash Surrender Value Life Insurance..... | | |
| Value of Businesses Owned | | |
| Listed Stocks and Bonds | | |
| Privately-held Stocks & Bonds..... | | |
| House (Market Value) | | |
| Automobile-Number () | | |
| Household Furnishings and Personal Effects | | |
| Real Estate (other than House) | | |
| Other Assets (Itemize) | | |
| TOTAL ASSETS | \$ | |

Liabilities and Net Worth

| | | |
|---------------------------------------|-----------|--|
| Notes Payable | \$ | |
| Loan on House..... | | |
| Liens on Real Estate | | |
| Credit Card Debt (over 30 days) | | |
| 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 he/she provided this information and it is true and correct.

Date: _____

Signature: _____ Home Phone: _____

Broker: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____ email: _____