

FINANCIAL STATEMENT

Name _____

Are you currently a business owner? _____ If yes, number of years _____

What type of business are you in? _____

Please describe the skills you possess to ensure your success as an owner of this business:

ASSETS

Cash on Hand in Banks	\$
US Government Securities	
Cash Surrender Value Life Insurance	
Value of Business Owned	
Other Stocks & Bonds	
Real Estate	
Automobiles Number ()	
Household Furnishings & Personal Effects	
Other Assets	
TOTAL ASSETS	\$

LIABILITIES & NET WORTH

Notes Payable	\$
Liens on Real Estate	
Other Liabilities	
TOTAL LIABILITIES	
NET WORTH	\$

SOURCE OF INCOME

Salary	\$
Dividends & Interest	
Bonus & Commissions	
Real Estate Income	
Other Income	
TOTAL INCOME	\$

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

ACCEPTED:

Signature _____ Date _____ Email Address _____

Print Name, Telephone Number & Fax Number _____

Address, City & Zip Cod _____