

PERSONAL FINANCIAL STATEMENT

Name: _____

ASSETS

Cash on hand and in banks (See schedule # 1) \$ _____

Stocks and bonds (See schedule # 2) _____

Accounts/Notes Receivable (See schedule # 3) _____

Real Estate Investments (See schedule # 4) _____

Net Value of Business _____

Life Insurance – Cash Value _____

Other assets _____

LIABILITIES

Loans, Notes, Mortgages (See schedule # 5) \$ _____

Accounts and bills due _____

Taxes Due _____

Liens Payable _____

Other Liabilities (itemize) _____

TOTAL ASSETS _____

TOTAL LIABILITIES _____

TOTAL NET WORTH _____

Capital available to invest _____

Residence Own _____ Rent _____ How Long _____

CONTINGENT LIABILITIES

As endorser or co-maker \$ _____

On leases or contracts _____

Legal Claims _____

Other contingent liabilities _____

TOTAL CONTINGENT LIABILITIES \$ _____

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SCHEDULE # 1 BANKING REFERENCES (List all bank accounts, including Savings & Loan)

Institution	Account #	Contact	Cash Balance
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SCHEDULE # 2 STOCKS & BONDS

Number of Shares	Description Of Security	Marketable or Non-marketable	Balance on Margin Cost	Current Market Value
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SCHEDULE # 3 ACCOUNTS/NOTES RECEIVABLE

SCHEDULE # 4 REAL ESTATE INVESTMENTS (List all Real Estate held)

SCHEDULE # 5 LOANS, NOTES AND MORTGAGES PAYABLE

Payable to	Amount
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PERSONAL FINANCIAL STATEMENT

BUYER INFORMATION:

NAME: _____

ADDRESS: _____

CITY: _____

STATE: _____

HOME PHONE: _____

BUSINESS PHONE: _____

Signature

Date

