



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		\$ _____



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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: _____