



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: _____