SUNBELT®
BUSINESS
BROKERS

FINANCIAL STATEMENT - STRICTLY CONFIDENTIAL

Name(s) _____

Street Address _____

City _____ State _____ Zip Code _____

ASSETS

Cash on Hand and in Banks	$
Stocks and Bonds at Fair Market Value	$
U.S. Government Securities	$
Retirement Funds (IRA's, etc.)	$
Cash Surrender Value of Life Insurance	$
$ Value of Businesses owned	$
Accounts/Notes Receivables	$
Real Estate – Residence	$
Real Estate – Other	$
Automobile – Number ( )	$
Household Furnishings and Personal Effects	$
Other Assets (Itemize)	$
_____	
_____	
Total Assets	**$_____**

LIABILITIES

Notes Payable	$
Liens on Real Estate	$
Other Liabilities (Itemize)	$
_____	
Total Liabilities	**$_____**

Net Worth (Assets – Liabilities) $_____

Source of Annual Income

Salary, Bonus & Commissions	$
Other Income _____	$

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

_____ _____ _____

Signature(s) **Date** **Home Phone #**