

**Personal Financial Statement – Strictly Confidential**

Name: \_\_\_\_\_  
 Street Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Email: \_\_\_\_\_  
 Telephone: HOME \_\_\_\_\_ OFFICE \_\_\_\_\_

Cash on Hand in Banks	\$
US Government Securities or Bank CD's	\$
Accounts, Loans and Notes Receivable	\$
Other Stocks and Bonds	\$
Value of Businesses Owned	\$
Real Estate – Personal Residence	\$
Real Estate – Investment Property	\$
Automobiles – Number ( )	\$
Household Furnishings and Personal Effects	\$
Other Assets -- list	\$
	\$
	\$
<b>TOTAL ASSETS</b>	\$

Notes Payable	\$
Real Estate Mortgage – Personal Residence	\$
Real Estate Mortgage – Investment Property	\$
Other Liabilities -- list	\$
	\$
	\$
	\$
<b>TOTAL LIABILITIES</b>	\$

<b>NET WORTH</b>	\$
------------------	----

**Source of Annual Income**

Salary – Self	\$
Salary - Spouse	\$
Bonus and Commissions	\$
Real Estate Net Income	\$
Other Income - list	\$
	\$
<b>TOTAL ANNUAL INCOME</b>	\$

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

Date: \_\_\_\_\_ Signature: \_\_\_\_\_

**Business Brokers New York, LLC**

PO Box 130 Ionia, NY 14475 • Phone: 585.624.7998 • Fax: 702.995.8388