



2200 Elm Avenue
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Love where you live

CONFIDENTIAL FINANCIAL STATEMENT

Name _____ Spouse _____

Address _____ Phone _____

If you need more space to complete any part of this form, please attach the additional information

| Assets | Totals | Liabilities | Totals |
|-----------------------------------|--------|---|--------|
| Cash On Hand & In Banks | \$ | Accounts & Bills Due | \$ |
| Total Investment Portfolio Value | \$ | Real Estate Mortgages Payable (Itemize Below) | \$ |
| Real Estate Owned (Itemize Below) | \$ | Other Debts (Itemize) | \$ |
| Certificates of Deposit | \$ | | |
| Other Assets (Itemize) | \$ | | |
| | | | |
| | | Total Assets | \$ |
| Total Assets | \$ | Net Worth (Total Assets Minus Total Liabilities) | |
| | | | \$ |

| Description of Real Estate Owned | Date Acquired | Title in Name Of | Cost | Market Value | Mortgage | |
|----------------------------------|---------------|------------------|------|--------------|----------|-------|
| | | | | | Amount | Terms |
| | | | | | \$ | |
| | | | | | \$ | |

| Annual Income | Totals | <p style="text-align: center;">Please Attach A Copy of Your Most Recent Brokerage & Bank Statements Along With a Copy of Your Tax Return</p> <p>I affirm that this information is correct and complete to the best of my knowledge.</p> <p>_____ Signed</p> <p>_____ Spouse</p> <p>_____ Date</p> |
|---------------------|-----------|--|
| Social Security | \$ | |
| Annuity | \$ | |
| Pension | \$ | |
| Real Estate Income | \$ | |
| Interest/Dividends | \$ | |
| Other (Specify) | \$ | |
| Total Income | \$ | |