

Financial Statement – Strictly Confidential

Please fill out the form and send, email or fax the statement back to Truforte Business Group or give to their confidential representative. It is understood that the Broker, its agents and officers, will hold this information in strict confidence.

Name: _____ Phone: _____
 Address: _____
 City: _____ State: _____ Zip Code: _____

ASSETS

Cash on Hand in Banks.....	\$	_____
U.S. Government Securities.....	\$	_____
Account, Loans and Notes Receivable.....	\$	_____
Cash Surrender Value of Life Insurance.....	\$	_____
Value of Businesses Owned.....	\$	_____
Other Stocks and Bonds.....	\$	_____
Real Estate.....	\$	_____
Automobiles – Number (____)	\$	_____
Household Furnishings and Personal Effects.....	\$	_____
Other Assets Itemized Below:		
_____	\$	_____
_____	\$	_____
<u>TOTAL ASSETS</u>	\$	_____

LIABILITIES

Notes Payable.....	\$	_____
Liens on Real Estate.....	\$	_____
Other Liabilities Itemized Below:		
_____	\$	_____
_____	\$	_____
<u>TOTAL LIABILITIES</u>	\$	_____

NET WORTH

TOTAL ASSETS – TOTAL LIABILITIES \$ _____

SOURCE OF INCOME

Salary.....	\$	_____
Dividends and Interest.....	\$	_____
Bonus and Commissions.....	\$	_____
Real Estate Income.....	\$	_____
Other Income: _____	\$	_____
<u>TOTAL INCOME</u>	\$	_____

The undersigned certifies that this information is true and correct.

Signature: _____ Date: _____