

Personal Financial Information

This information will help determine the size of the business that you are capable of buying.

Name _____

Home Address _____

City, State, Zip _____

Date of statement _____

Assets

Cash in bank \$ _____

Value of IRA \$ _____

Value of 401K \$ _____

Investments, stocks _____

Bonds \$ _____

Value of _____

Real Estate owned \$ _____

Cash Value Life Ins. \$ _____

Auto's Describe \$ _____

2. Auto's Describe \$ _____

Other Assets Itemize \$ _____

Total Assets \$ _____

Liabilities

Notes Payable unsecured \$ _____

Notes Payable secured \$ _____

Real Estate Mortgage \$ _____

Installment Loans \$ _____

Total Liabilities \$ _____

Subtract Total Assets
from Total Liabilities

Net Worth \$ _____

The above is a true and accurate representation of my net worth.

Signature Date