

PERSONAL FINANCIAL DISCLOSURE STATEMENT

To: _____

Date: _____

Individual Information

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Occupation: _____

Phone: _____

Current Assets

Cash on Hand or in Banks

Other Cash:

Real Estate (other than residence Schedule A)

Residence

Motor Vehicles (Schedule B)

US Government Securities (Schedule C)

Non-Marketable Securities (Schedule D)

Stocks (Schedule E)

Other Personal Property

Life Insurance Cash Value

Business IRA

Notes Receivable

Other Assets:

Personal IRA

Antiques

Partnership Assets

Total Assets

Current Liabilities

Notes Payable (Secured)(Schedule F)

Notes Payable (Unsecured)(Schedule G)

Real Estate Mortgages Payable (Schedule H)

Auto Loans (Schedule I)

Unpaid Taxes and Interest

Due to Brokers

Open Accounts

Credit Cards (List):

Visa

Other:

Residential Mortgage

Total Liabilities

TOTAL OF ALL ASSETS

LESS TOTAL OF ALL LIABILITIES

NET WORTH

Individual Income Information (Annual)

Salary

Bonus

Commissions

Dividends

Rental Income

Other Income (List):

Total Income

Contingent Liabilities

Guarantor, Co-maker

Lease or Contracts

Legal Claims

Other:

SCHEDULE "A" REAL ESTATE

Description of Real Estate	Cost	Market Value	Date Acquired
Totals			

SCHEDULE "B" MOTOR VEHICLES

Description of Motor Vehicles	Cost	Value
Totals		

SCHEDULE "C" U.S. GOVERNMENT SECURITIES

SCHEDULE C - U.S. GOVERNMENT SECURITIES			
Description of Stock or Bond	Date Acquired	Par Value	Market Value
Totals			

SCHEDULE "D" NON MARKETABLE SECURITIES

Description	Date Acquired	Par Value	Market Value
Totals			

SCHEDULE "E" STOCKS

Company	Shares	Date Acquired	Par Value	Market Value
Totals				

SCHEDULE "F" NOTES PAYABLE SECURED

Description	Date	Balance	Payment (m/yr)
Totals			

SCHEDULE "G" NOTES PAYABLE UNSECURED

Description	Date	Balance	Payment (m/yr)

SCHEDULE "H" REAL ESTATE MORTGAGES

Description	Date	Balance	Payment (m/yr)
Totals			

SCHEDULE "I" AUTO LOANS

Description	Date	Balance	Payment (m/yr)
Totals			

CERTIFICATION TO FINANCIAL STATEMENT

I certify this Statement to be true and correct as of the date indicated; that this financial statement is a full and fair disclosure of my assets; and that I provided a true and correct copy of this financial statement to _____ on _____.

Signature

Date: _____

I _____ acknowledge receipt of this financial statement and disclosure.

Signature

Date: _____

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TOTAL OF ALL ASSETS

LESS TOTAL OF ALL LIABILITIES

NET WORTH

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Totals			

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Description of Motor Vehicles	Cost	Value
Totals		

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Description of Stock or Bond	Date Acquired	Par Value	Market Value
Totals			

SCHEDULE "D" NON MARKETABLE SECURITIES

Description	Date Acquired	Par Value	Market Value
Totals			

SCHEDULE "E" STOCKS

SCHEDULE E STOCKS				
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Totals				

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Description	Date	Balance	Payment (m/yr)
Totals			

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Description	Date	Balance	Payment (m/yr)

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Description	Date	Balance	Payment (m/yr)
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