

# McNeff Companies, Inc.

## Personal Financial Statement

### Individual Financial Statement

Strictly Confidential

Name \_\_\_\_\_ Social Security # \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

#### Assets

|                                            |    |
|--------------------------------------------|----|
| Cash on Hand and in Banks                  | \$ |
| U.S Government Securities                  |    |
| Accounts, Loans and Notes Receivable       |    |
| Cash Surrender Value Life Insurance        |    |
| Value of Businesses Owned                  |    |
| Other Stocks and Bonds                     |    |
| Real Estate                                |    |
| Automobiles---Number ( )                   |    |
| Household Furnishings and Personal Effects |    |
| Other Assets ( Itemize )                   |    |

TOTAL ASSETS \$ \_\_\_\_\_

#### Liabilities and Net Worth

|                             |    |
|-----------------------------|----|
| Notes Payable               | \$ |
| Liens on Real Estate        |    |
| Other Liabilities (Itemize) |    |

TOTAL LIABILITIES \$ \_\_\_\_\_

NET WORTH \$ \_\_\_\_\_

#### Source of Income

|                        |    |
|------------------------|----|
| Salary                 | \$ |
| Dividends and Interest |    |
| Bonus and Commissions  |    |
| Real Estate Income     |    |
| Other Income           |    |

TOTAL INCOME \$ \_\_\_\_\_

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

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