

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 _____ Phone _____