



3419 Via Lido Ste 424 Newport Beach CA 92663
 Phone: 949-258-9800 Fax: 949-258-9801
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Personal Financial Statement Form

PERSONAL INFORMATION	Name	Date of Birth	Social Security Number	Address
	Spouse's Name	Date of Birth	Social Security Number	

Statement of Assets and Liabilities as of _____.			
ASSETS		LIABILITIES	
Cash on Hand	\$ _____	Notes Payable	\$ _____
Cash in following banks		Accounts Payable	\$ _____
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____
_____	\$ _____	Taxes Due	\$ _____
Marketable Securities	\$ _____	Mortgages on Real Estate	
_____	\$ _____	Description and location	
_____	\$ _____	1. _____	\$ _____
Notes Receivable	\$ _____	2. _____	\$ _____
Real Estate in MY name		3. _____	\$ _____
Description and location		Other Liabilities (describe)	
1. _____	\$ _____	_____	\$ _____
2. _____	\$ _____	_____	\$ _____
3. _____	\$ _____	TOTAL LIABILITIES	\$ _____
Personal Property		NET WORTH	\$ _____
_____	\$ _____	TOTAL LIABILITIES AND NET WORTH	\$ _____
Other Assets (describe)			
_____	\$ _____		
TOTAL ASSETS	\$ _____		

The undersigned hereby certifies that the list of assets and liabilities given herein is a true and correct statement of the financial condition on the date given above and that the depositories are hereby authorized to confirm any inquiry made by _____ or its representatives as to any statement made herein relative to monies on deposit or loans made.

Dated this _____ day of _____, _____.

X _____
 (Sign here)

X _____
 (Sign here)

AGENT/BROKER INFORMATION	Agent/Broker Name	Code	Phone No.	Fax No.	City	State	Zip
	White Lion Insurance Services	69746	(949)258-9800	(949)258-9801	Newport Beach	CA	92663