

PERSONAL AND CONFIDENTIAL

Financial Statement

Date: ___/___/___

Name _____ SS # _____
 Address _____
 City _____ State _____ Zip Code _____
 Home Phone () _____ Business Phone () _____
 E-mail: _____
 Present Occupation or Business _____

ASSETS		LIABILITIES	
Cash on Hand and in Banks		Notes to Bank	
U.S. Government Securities		Notes to Others	
Stocks and Bonds		Mortgage on Home	
IRA's, 401(k)		2nd Mortgage on Home	
Accounts and Loans Receivable		Mortgages - Other Real Estate	
Cash Surrender Value - Life Ins.		Automobiles	
Value of Business Owned		Credit Card Balances	
Real Estate		Taxes Due	
Automobiles - Number ()		Other	
Household & Other Personal Assets			
TOTAL ASSETS	\$	TOTAL LIABILITIES	\$
		NET WORTH	\$

SOURCE OF INCOME

Salary	
Bonus and Commissions	
Real Estate Income	
Other Income	
TOTAL INCOME	\$

The undersigned certifies that this information is true and correct.

Signature: X _____ Date: _____

GMDC Business Consultants.
 P.O. Box. 583, Plainview, NY 11803
 Phone: 1-516-942-3588 E-Fax: 1-516-706-4000
 Email: gmdc1@juno.com Website: www.gmdcbc.com