



PERSONAL FINANCIAL STATEMENT

FAX SIGNED FORM
TO
713-490-9052

NAME	EMPLOYED BY
RESIDENCE ADDRESS ___ Own ___ Rent	OCCUPATION
PHONE	EMAIL
Partner/officer in any other venture? ___ No ___ Yes Are any assets pledged? ___ No ___ Yes Have you ever declared bankruptcy? ___ No ___ Yes	
ASSETS	
Cash On Hand & In Banks	\$
IRA, 401K, Other Retirement Accounts	\$
U.S. Government Securities	\$
Accounts, Loans & Notes Receivable	\$
Cash Surrender Value Life Insurance	\$
Publicly Traded Stocks & Bonds	\$
Real Estate (Home)	\$
Real Estate (Other)	\$
Other Assets (Itemize)	\$
TOTAL ASSETS	\$
LIABILITIES & NET WORTH	
Notes Payable to Banks	\$
Accounts & Notes Payable to Other	\$
Loans on Real Estate (Home)	\$
Loans on Real Estate (Other)	\$
Other Liabilities (Itemize):	\$
TOTAL LIABILITIES	\$
NET WORTH	\$

For the purpose of obtaining confidential business information regarding Certified Business Brokers' listings, the undersigned submits this statement as a true and accurate statement of his/her financial condition as of the date below and agrees that if any change occurs that materially impacts the net worth shown above, the undersigned will immediately notify CBB, and unless CBB is so notified, CBB may continue to rely upon this statement as a true and accurate statement of financial condition.

Signature: _____

Date: _____