

# UHLE INSURANCE SERVICES

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## PERSONAL FINANCIAL STATEMENT

AS OF \_\_\_\_\_, 20 \_\_\_\_\_

**NOTE: This form is to be used for PERSONAL FINANCIAL STATEMENTS only. NOT TO BE USED FOR BUSINESS STATEMENTS**

PERSONAL FINANCIAL STATEMENT OF:

NAME \_\_\_\_\_ S.S. NO. \_\_\_\_\_ D.O.B. \_\_\_\_\_

STREET ADDRESS \_\_\_\_\_

CITY/STATE/ZIP \_\_\_\_\_

NAME OF SPOUSE \_\_\_\_\_ S.S. NO. \_\_\_\_\_ D.O.B. \_\_\_\_\_

BUSINESS PHONE \_\_\_\_\_ HOME PHONE \_\_\_\_\_

CURRENT ASSETS	CURRENT LIABILITIES	
Cash on hand (not in bank) .....	Notes payable to (names and addresses):	
Cash In following banks (names and addresses):	.....	
.....	.....	
.....	Sales contracts & chattel mtgs. (Sch 6) .....	
Stocks and bonds (Schedule 1) .....	Accounts payable .....	
Accounts receivable (Schedule 2) .....	Current portion of long term debt .....	
Notes receivable .....	Other current liabilities (Schedule 6) .....	
Other current assets (Itemize):	.....	
.....	.....	
.....	Current year's income taxes unpaid .....	
.....	Prior year's income taxes unpaid .....	
.....	Real estate taxes unpaid .....	
<b>TOTAL CURRENT ASSETS</b>	<b>TOTAL CURRENT LIABILITIES</b>	
FIXED ASSETS	LONG TERM LIABILITIES	
Real estate (Schedule 4):	Real estate debt (Schedule 4):	
Residence .....	Residence .....	
Other .....	Other .....	
Cash value of life Insurance (Schedule 5): .....	Borrowed on life insurance (schedule 5):.....	
Other assets and Investments (Schedule 6):	Other long term debt (Schedule 6):	
.....	.....	
.....	.....	
.....	<b>TOTAL LONG TERM LIABILITIES</b>	
<b>TOTAL FIXED ASSETS</b>	<b>NET WORTH</b>	
<b>TOTAL ASSETS</b>	<b>TOTAL LIABILITIES AND NET WORTH</b>	

CONTINGENT LIABILITIES FOR ENDORSEMENTS OR GUARANTEES \$ \_\_\_\_\_ FOR OTHER PURPOSES \$ \_\_\_\_\_

GIVE DETAILS \_\_\_\_\_

**SCHEDULE 1. STOCKS AND BONDS**

Name of security	No. shares	If any pledged, state to whom and for what purpose	Dividends paid last two years	Market value	Book value
<b>TOTALS</b>				<b>\$</b>	<b>\$</b>

**SCHEDULE 2. ACCOUNTS RECEIVABLE**

Name and address (street and city) from whom due	For what is it due	When sold	When due	Amount
<b>TOTALS</b>				<b>\$</b>

**SCHEDULE 3. NOTES RECEIVABLE**

Name and address (street and city) from whom due	For what due	How secured	Date	Maturity	Amount
<b>TOTALS</b>					<b>\$</b>

**SCHEDULE 4. REAL ESTATE**

Description of property	Title in name of	Market value	Cost	DATE acquired	Amount encumbrance	Monthly payments	Monthly income
<b>TOTALS</b>		<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

**SCHEDULE 5. LIFE INSURANCE - CASH VALUE**

Name of company	Policy number	Name of Insured	Beneficiary	Face value	Cash value	Amount borrowed

**SCHEDULE 6. DETAILS RELATIVE TO OTHER IMPORTANT ASSETS AND LIABILITIES**

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Authority is hereby granted to any individual, firm or corporation, and any financial institution to furnish Uhle Insurance Services upon request with any information concerning the above statement or pertaining to the Undersigned's financial standing, credit or manner of meeting obligations.

SIGNED AND SEALED THIS \_\_\_\_\_ DAY OF \_\_\_\_\_ 20 \_\_\_\_\_

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