



**CONFIDENTIAL BUYERS FINANCIAL INFORMATION**

**Financial Statement**

**Date of Financial Information:** \_\_\_\_ - \_\_\_\_ - \_\_\_\_

**Name:** \_\_\_\_\_

**Spouse:** \_\_\_\_\_

**Social Security #** \_\_\_\_ - \_\_\_\_ - \_\_\_\_

**Assets**

**Liabilities**

Cash on hand or in bank \$ \_\_\_\_\_

Installment Notes & Contracts \$ \_\_\_\_\_

Principal Residence \_\_\_\_\_

Real Estate Mortgages \_\_\_\_\_

Secondary Residence \_\_\_\_\_

Bills Payable \_\_\_\_\_

Other Real Estate \_\_\_\_\_

Other \_\_\_\_\_

Autos & Recreational Equipment \_\_\_\_\_

**Total Liabilities** \_\_\_\_\_ **(B)**

Personal Property \_\_\_\_\_

**Total Assets (A)** \_\_\_\_\_

Retirement Accounts \_\_\_\_\_

**Total Liabilities (B)** - \_\_\_\_\_

Other Investments \_\_\_\_\_

Total Assets \_\_\_\_\_ **(A)**

**Net Worth (A minus B)** = \_\_\_\_\_

**Please describe in detail** (use separate sheet if necessary) from what sources and in what dollar amounts your initial and ongoing capital requirements will be available: \_\_\_\_\_

**Bank Information:**

**Bank Name:** \_\_\_\_\_ **Loan Officer:** \_\_\_\_\_

**Bank Address:** \_\_\_\_\_

**Bank City:** \_\_\_\_\_ **State:** \_\_\_\_\_

Geographic area in which I prefer to own a business: \_\_\_\_\_

Indicate your present annual salary range (in thousands):

\$20 -40    \$40-60    \$60-80    \$80-100    \$100-120    \$120-150    \$150-200    \$200+

What annual income do you feel you must realize? 1<sup>st</sup> year \$ \_\_\_\_\_ 2<sup>nd</sup> \$ \_\_\_\_\_ 3<sup>rd</sup> \$ \_\_\_\_\_

Have you ever filed for bankruptcy?    Yes    No

Have you ever been convicted of a felony?    Yes    No

Personal and professional goals:

Everything I have stated in this profile is correct to the best of my knowledge. I understand that Cantrell-Viala & Associates will retain this financial information whether or not I am approved. I also authorize Cantrell-Viala & Associates to contact my bank, check my background and obtain a credit report on me, personally.

Signature: \_\_\_\_\_ Date: \_\_\_\_ - \_\_\_\_ - \_\_\_\_

Print Name: \_\_\_\_\_