

PERSONAL FINANCIAL STATEMENT

All information provided herein shall be held CONFIDENTIAL by Fulcrum Partners LLC and shall not be provided to any third party without your written permission.

Name: _____
Address: _____
Ct/St/ZIP: _____

Email: _____
Phone: _____
Cell: _____

Assets -----
Cash _____
Stock _____
A/R _____
Real Estate _____
Businesses owned _____
Life insurance Cash Value _____
Other _____

Total Assets _____

Liabilities -----
Loans _____
Mortgages _____
Accounts & Bills _____
Other _____

Total liabilities _____

NET WORTH _____

Capital available to invest in a business _____

Home / Residence Own _____

How long _____

Contingent liabilities _____

DATE: _____

SIGNATURE: _____