

Benjamin Ross Group, LLC.
Financial Statement

Name _____

Address _____

City _____ State _____ Zip _____

Liquidity

Cash on Hand in Banks _____

Stocks and Bonds (non 401K) _____

Stocks and Bonds (401K) _____

Total Liquidity _____

Fixed Assets

Primary Real Estate Market Value _____

Balance left on Primary Mortgage _____ (_____)

Secondary Mortgage/Home Equity Used _____ (_____)

Investment Real Estate Market Value _____

Balance left on Investment Real Estate _____ (_____)

Total Fixed Asset Equity _____

Liabilities

Primary Mortgage payment -Per Year _____

Secondary Mortgage Payments-Per Year _____

Auto payment- Per Year _____

Other installment payments-Per Year _____

(Student loan, alimony, etc.) _____

Credit card payments(monthly averageX12) _____

Total Yearly Liabilities _____

Source of Income

Buyer

Spouse

Salary _____

Bonus and Commissions _____

Real Estate Rental Income _____

Other Income _____

Total Income _____

	Yes	No
Have you ever defaulted on a government backed loan? (i.e. Student loan or SBA loan)	<input type="checkbox"/>	<input type="checkbox"/>
Have you ever been convicted of a felony?	<input type="checkbox"/>	<input type="checkbox"/>
Have you ever declared bankruptcy?	<input type="checkbox"/>	<input type="checkbox"/>
I am a U.S. Citizen	<input type="checkbox"/>	<input type="checkbox"/>
I have Lawful Permanent Resident (LPR) status	<input type="checkbox"/>	<input type="checkbox"/>

The undersigned certifies that this information was provided by him/her and is true and correct.

Name _____

Phone Number _____ Date _____