



# LIFE & DISABILITY DIVISION

## Confidential Financial Statement

Proposed Insured: FIRST \_\_\_\_\_ MIDDLE \_\_\_\_\_ LAST \_\_\_\_\_

The following financial disclosure is made for the purpose of establishing insurability in connection with a pending application on myself. This is furnished as a true and accurate statement of my financial condition as of:

\_\_\_\_\_, 20\_\_

	Column (A) CURRENT YTD 20__	Column (B) LAST YEAR 20__	Column (C) TWO YEARS AGO 20__
<b>I. ANNUAL INCOME</b> from occupation or profession			
Net income (after business expenses, before taxes) (Include nonpassive income from Schedule K-1)	US\$ _____	US\$ _____	US\$ _____
Commission Income	US\$ _____	US\$ _____	US\$ _____
Bonuses	US\$ _____	US\$ _____	US\$ _____
Pension & Profit Sharing Contributions	US\$ _____	US\$ _____	US\$ _____
Royalty Income	US\$ _____	US\$ _____	US\$ _____
<b>II. OTHER INCOME</b>			
Dividends and Interest	US\$ _____	US\$ _____	US\$ _____
Net Real Estate Income before Depreciation (Net income after expenses)	US\$ _____	US\$ _____	US\$ _____
Passive income from Schedule K-1	US\$ _____	US\$ _____	US\$ _____
Other (Please specify) _____	US\$ _____	US\$ _____	US\$ _____
_____	US\$ _____	US\$ _____	US\$ _____
<b>III. TOTAL CURRENT NET WORTH</b> (Please itemize below)	US\$ _____		
Cash, Savings, Stocks, Bonds		US\$ _____	
Personal Property (e.g. furnishings, jewelry, car, boat, etc.)		US\$ _____	
Personal Residence (fair market value less mortgages, loans)		US\$ _____	
Other Real Estate (fair market value less mortgages, loans)		US\$ _____	
Business Interest (show fair market value less mortgages, loans)		US\$ _____	
Other (Please specify) _____		US\$ _____	
_____		US\$ _____	
<b>IV. ADDITIONAL CLARIFYING INFORMATION</b>			
<b>V. ARE YOU A PARTY TO ANY LEGAL PROCEEDING AT THIS TIME?</b> <input type="checkbox"/> YES <input type="checkbox"/> NO If "yes", furnish all details.			

I hereby certify that the above answers are true and complete to the best of my knowledge and belief.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Proposed Insured

### PETERSEN INTERNATIONAL UNDERWRITERS

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