

**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**

Rent or 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)		
Have you ever been convicted of a felony?		
Have you ever declared bankruptcy?		
Are you currently a party to any judgments, liens, or lawsuits?		
I am a U.S. Citizen.		
I have Lawful Permanent Resident (LPR) status.		

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

Name \_\_\_\_\_

Phone Number \_\_\_\_\_ Date \_\_\_\_\_

**Benjamin Ross Group, LLC .**

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