

**CG&Associates Realty Advisors LLC**

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**Confidential Buyer Financial Information**

ASSETS

LIABILITIES

Cash in checking accounts \$ \_\_\_\_\_  
 Cash in savings accounts \$ \_\_\_\_\_  
 Stocks and bonds \$ \_\_\_\_\_  
 IRAs, 401Ks, retirement plans \$ \_\_\_\_\_  
 Cash value of life insurance \$ \_\_\_\_\_  
 Real estate - homestead \$ \_\_\_\_\_  
 Other real estate owned \$ \_\_\_\_\_  
 Automobiles \$ \_\_\_\_\_  
 Businesses owned \$ \_\_\_\_\_  
 Furnishings & personal property \$ \_\_\_\_\_  
 Other: \_\_\_\_\_ \$ \_\_\_\_\_  
 Other: \_\_\_\_\_ \$ \_\_\_\_\_  
 Other: \_\_\_\_\_ \$ \_\_\_\_\_  
 Other: \_\_\_\_\_ \$ \_\_\_\_\_

Notes payable to banks \$ \_\_\_\_\_  
 Real estate lien notes \$ \_\_\_\_\_  
 Notes to finance cos. \$ \_\_\_\_\_  
 Notes on automobiles \$ \_\_\_\_\_  
 Life insurance balance due \$ \_\_\_\_\_  
 Charge accounts \$ \_\_\_\_\_  
 Credit cards \$ \_\_\_\_\_  
 IRS taxes payable \$ \_\_\_\_\_  
 State taxes payable \$ \_\_\_\_\_  
 Other: \_\_\_\_\_ \$ \_\_\_\_\_  
 Other: \_\_\_\_\_ \$ \_\_\_\_\_  
 Other: \_\_\_\_\_ \$ \_\_\_\_\_  
 Other: \_\_\_\_\_ \$ \_\_\_\_\_  
 Other: \_\_\_\_\_ \$ \_\_\_\_\_

TOTAL ASSETS \$ \_\_\_\_\_

TOTAL LIABILITIES \$ \_\_\_\_\_

NET WORTH (total assets minus total liabilities) \$ \_\_\_\_\_  
 Down payment capital available \$ \_\_\_\_\_  
 Amount to finance \$ \_\_\_\_\_  
 Total capital investment \$ \_\_\_\_\_

Is there an investor, partner or any other source for down payment? (circle one) Yes No

If yes, name source: \_\_\_\_\_

Do you have any other income sources?(circle one) Yes No

If yes, name of source: \_\_\_\_\_

Income expectations after 1 year: \$ \_\_\_\_\_ after 2 years: \$ \_\_\_\_\_

This information is a true and correct representation of my financial information. THIS QUESTIONNAIRE IS NOT A CONTRACT and is not binding on Realty Advisors LLC or the Buyer. I understand that the purpose of this questionnaire is to compile general information for a potential transaction involving the purchase of property or a business.

Date: \_\_\_\_\_

Buyer: X \_\_\_\_\_

Buyer: X \_\_\_\_\_