

Personal Financial Statement

Name(s): _____ SSN(s): _____
 Address: _____ City/State/Zip: _____

Statement of Financial Condition as of: _____

Assets	In Dollars \$	Liabilities	In Dollars \$
Cash in Hand & Banks (Personal)	\$ _____	Notes Payable to Banks	\$ _____
Cash in Banks (Business)	\$ _____	Notes Payable to Others	\$ _____
Stocks & Bonds	\$ _____	Installment Accts Payable	\$ _____
IRA & 401k – Retirement Accts	\$ _____	Other Accts Payable	\$ _____
Real Estate (Primary Home)	\$ _____	Real Estate Mortgages (Primary)	\$ _____
Real Estate (2 nd Home)	\$ _____	Real Estate Mortgages (2 nd Home)	\$ _____
Real Estate (Other)	\$ _____	Real Estate Mortgages (Other)	\$ _____
Life Insurance – Cash Value	\$ _____	Life Insurance – Loans	\$ _____
Automobiles	\$ _____	Automobile Loans	\$ _____
Other Assets (Itemize)	\$ _____	Other Liabilities (Itemize)	\$ _____
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____
TOTAL ASSETS (A):	\$ _____	TOTAL LIABILITES (B):	\$ _____
		(A)-(B) = NET WORTH:	\$ _____

Sources of Annual Income:			
Salary	\$ _____	Salary (Co-Applicant)	\$ _____
Commissions/Bonuses	\$ _____	Dividend Income	\$ _____
Interest Income	\$ _____	Rental Income	\$ _____
Partnership/S-Corp Dividends	\$ _____	Other: _____	\$ _____
Capital Gains	\$ _____	Other: _____	\$ _____
Income Taxes (Date Settled Through): _____		TOTAL ANNUAL INCOME:	\$ _____

Personal Information:

- Do you have a Will / Estate Plan: Yes ___ No ___ Name of Executor: _____
- Are you obligated to pay: Alimony ___ Child Support ___ Separate Maintenance ___ Amount: \$ _____
- Are you a Defendant in any: Legal Suits ___ Legal Actions ___ Explain: _____
- Are there any unsatisfied Judgments against you: Yes ___ No ___ Explain: _____
- Have you (or a Company you had any ownership in) ever declared Bankruptcy: Yes ___ No ___ Explain: _____
- Are you a Partner or Officer in any other Venture: Yes ___ No ___ Explain: _____
- Are any assets Pledged, held in a Trust, in Estate or in any other name or capacity: Yes ___ No ___ Explain: _____
- Do you have any Contingent Liabilities: Yes ___ No ___ Explain: _____
- What is your total Life Insurance Coverage: \$ _____ What is your Disability Insurance Coverage: \$ _____

Schedule 1 – Marketable Securities

Description (Security or Acct Name)	In Name of	No. Of Shares or Face Value	Current Price Per Share	Current Market Value

Schedule 2 – Real Estate Holdings

	Property 1	Property 2	Property 3	Property 4
Property Type:				
Property Address:				
Date Acquired:				
Original Cost:				
Current Value:				
Mortgage Balance:				
Total Monthly Pmt:				

For the purpose of obtaining and/or maintaining credit, I submit this financial statement and supporting schedules, including all federal tax returns, as a true, complete and accurate statement of my financial condition as of the date hereof and the date of my signature below. I will notify you immediately in the event of any material change in my financial condition, and until such time, you may continue to rely upon this statement. This statement shall remain your property. You are authorized to verify the information herein, and obtain such additional information as you may require, by contacting my spouse and other third parties. You may exchange with, or furnish information to, others regarding your credit experience with me.

Applicant Signature: X _____ Date: _____
 Co-Applicant Signature: X _____ Date: _____