

Personal Financial Statement

Financial condition as of	

Applicant	Co-Applicant
Name	Name
Street Address	Street Address
City/State/Zip	City/State/Zip
Date of Birth	Date of Birth
Social Security Number	Social Security Number
Telephone	Telephone
Employer	Employer
Position (Title)	Position (Title)
Dependents (Include Self)	Dependents (Include Self)
Marital Status	Marital Status

Assets	Sch.	\$ Liabilities	Sch.	\$
Cash and Certificates of Deposit	1	Accounts Payable		
Pension & Retirement Accounts		Taxes Payable		
Marketable Securities	2	Loans on Life Insurance	3	
Notes and Accounts Receivable		Credit Cards	7	
Cash Value Life Insurance	3	Notes and Mortgage Payables	8	
Investments Closely Held Companies	4	Other Liabilities		
Other Investments				
Residential Real Estate	5			
Investment Real Estate	6			
Autos				
Autos				
Other Assets				
		TOTAL LIABILITIES		
TOTAL ASSETS		NET WORTH		

			Annual Perso	nal Cash Flow		
Income	Applicant	(Co-Applicant	Expenses/Pa	ayments	Combined
Salary				Credit Cards		
Bonus				Auto Loans		
Commissions				Bank Loans		
Dividends/Interest				Home Mortgage Loan	s	
Business Income				Rent		
Real Estate Income				Estimated Income Tax	ces	
Other Income				Real Estate Taxes		
				Insurance		
				Living Expenses		
				Other Expenses		
TOTAL				TOTAL EXPENSES/PAYMENTS		
TOTAL	L JOINT INCOME			SURPLUS INCOME		
Poblodulo 1			Cool	h on Hand		
Schedule 1				h on Hand	A	of Balance
Name of Financial Institution			Type of Account		Account Balance	
				TOTAL		
				TOTAL		
Schedule 2				ities Owned		
Descript	tion		okerage Firm/ ancial Institution	No. of Shares	Price/Share	Current Market Value
Descrip	uon	ГШ	anciai institution	INO. Of Strates	Frice/Sriare	Market value
					TOTAL	
					TOTAL	
Schedule 3			Life I	nsurance		
Insurance Company	Insured		Beneficiary	Face Value	Cash Value	Loans

TOTAL

Description % Ownership Book Value Marke Marke Marke Marke Marke Marke Marke Marke	rent
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Schedule 5 Residential Real Estate Address Purchase Price Date Purchased Currer	: Value
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Schedule 6 Investment Real Estate	
Location and Type of Property Purchase Price Purchase Date Current Value Annual	Income

TOTAL

Schedule 7		Credit	Cards		
Company	Int. Rate	Payment	Frequency	Balance	Maturity
		•			
chedule 8	Othe	er Notes & Mort	gagos Pavablo		
	Int.				
Company	Rate	Payment	Frequency	Balance	Maturity
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		\$ -		¢	
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lease answer the following:					
ave you ever filed for bankruptcy?				Yes	
re you a co-maker, endorser, or gu			debt?	Yes	
re you presently the party of any for	_			Yes	
Are there any tax liens presently outstanding against you or your property?			Yes		
ave you executed a valid will?	Yes				
o you have a trust?	Yes				
o you have any contingent liabilitie	es?			Yes	No
If yes, please list the amount (\$)					
or the purpose of processing credi	t from time to	time, I/we furnis	sh the foregoing as a ti	rue and accurate stateme	ent
f my/our financial condition.					
uthorization is hereby given to The		•	•		l items
ndicated on this personal statemen	t, including in	quiries to credit	bureaus, employers, a	nd creditors.	
igned by:			Date Signed	:	
Signed by:					
	(Joint Applicar	nt)	_ Date Signed	l:	