



PERSONAL FINANCIAL STATEMENT

Company Name: _____ Date: _____

Full Name: _____ S.S.# _____ D.O.B: _____
 Spouse Name: _____ S.S.# _____ D.O.B: _____

Home Phone: _____ Alt Phone #: _____
 Address: _____ City, State, ZIP: _____

Statement of Financial Condition

Assets	In Dollars	Liabilities	In Dollars
Cash & CD's in Banks (Sch. A):		Unsecured Debt (Sch G):	
Stock Bonds & Marketable Securities (Sch.B):		Real Estate Mortgages (Sch. G):	
Real Estate Owned (Sch. C):		Secured Debt (Sch. H):	
Cash Surrender - Life Insurance (Sch. D):		Taxes Payable:	
Business Ventures (Sch. E):		Other Debts & Liabilities (specify):	
Notes Receivable (Sch. F):			
Personal Property (jewelry, collections, etc.):			
Automobiles, RV's, Boats:			
Other Assets (specify):			
Total Assets		Total Liabilities	

Accountant Name: _____
 Attorney Name: _____

Total Net Worth:	
Total Liabilities & Net Worth:	

Do you have a will? Yes No
 Do you have any...

Have you ever declared bankruptcy? Yes No
 If yes, explain:
 Est. Amount: _____
 Est. Amount: _____
 Est. Amount: _____
 Est. Amount: _____

contingent Liabilities? Yes No
 pending legal actions? Yes No
 contested income tax Liens? Yes No
 other special circumstances? Yes No

Schedule A: Cash & CD'S in Banks

Description	Name of Institution	In Name of:	Value

Schedule B: Stocks, Bonds, Marketable Securities

Name of Brokerage:	In Name of:	Pledged (Y/N)	Current Market Value:

Individual Securities Not Included above (Include IRA, 401K Accounts and other Retirement

# of Shares or Face Value	Individual Securities	Pledge or Held by:	Cost	Current Market Value	Retirement (Y/N)

Schedule C: Residence and other Real Estate

Address of Property	Title in Name of:	Percentage Owned	Year Acquired	Cost	Market Value	Mortgage Balance

Schedule D: Life Insurance Carried, Including Group Insurance

Name of Insurance Co.	Owner of Policy	Name of Insured	Beneficiary & Relationship	Face Amount	Policy Loans	Cash Surrender

Schedule E: Business Ventures and Other Assets

Name of Business	Type of Business	Years in Business	Net Worth	Percentage Owned	Value of your Ownership

Schedule F: Notes Receivable

Due From	Due Date	Description	Monthly Payment	Total Amount

Schedule G: Unsecured Debt (Credit Cards, Etc.)

Name of Creditor	Description of Debt	Monthly Payment	Amount Owed

Schedule H: Secured Debt (Home Equity, Vehicles, Boats, Etc.)

Name of Creditor	Unsecured or Secured (List Collateral)	Date of Loan	Loan/Line Amount	Maturity Date	Monthly Payment	Amount Owed

This information contained in this statement is provided to induce you to extend or to continue the extension of credit to the undersigned or to others upon the surety of the undersigned. The undersigned acknowledge and understand that you are relying on the information provided herein in deciding to grant or continue credit or to accept a surety thereof. Each of the undersigned represents, warrants, and certifies that the information provided herein is true, correct and complete. Each of the undersigned agrees to notify you immediately and in writing of any change in name, any of the undersigned to perform its (or their) obligations to you. In the absence of such notice or a new and full written statement, this should be considered as a continuing statement and substantially correct. You are authorized to make all inquiries you deem necessary to verify the accuracy of the information contained herein, and to determine the credit-worthiness of the undersigned. Each of the undersigned authorizes you to answer questions about your credit experience with the undersigned.

Signature (applicant) _____
 Print: _____

Date Signed _____

Signature (co-applicant) _____
 Print: _____

Date Signed _____