

# PERSONAL FINANCIAL STATEMENT

PERSONAL PROFILE					
Name		Age	Soc. Sec. Number		
Street Address		City		State	Zip
Home Phone ( )		Own	Rent	Other	How Long at Address:
Married:	Unmarried:	Separated:		Number of Dependents:	Ages:
Occupation:		Employer:			Yrs. At Company:
Spouse's Name		Spouse Occupation		Spouse SS#	
Spouse Employed By:		Yrs. At Company (Spouse)		Spouse Work Phone:	

**FINANCIAL STATEMENT. List all amounts in dollars. Omit cents. Attach a separate sheet if more space is needed.**

ASSETS	AMOUNT	DATE OF STATEMENT:	
Cash on Hand		<b>LIABILITIES</b>	<b>AMOUNT</b>
Cash in Institutions (banks, etc.) <b>Detail</b>		Income Tax payable	
		Other taxes payable	
Other Cash Equivalents		Revolving Credit (Schedule 4)	
Treasury Certificates/Bonds		Installment Contracts and Notes Payable (Sched. 4)	
NYSE & NASDAQ Listed Securities (Sched. 1)		Loans on Life Insurance	
Rated Corporate & Muni Bonds (Sched. 1)		Mortgage or Liens on Real Estate (Sched. 5)	
IRA/Keogh/Pension Balance (Sched. 2)		Other Liabilities (detail)	
Real Estate Market Value (Schedule 3)			
Automobiles			
Recreational Vehicles			
Boats & Planes			
Business Equity			
Name of Company:			
Other Investments (Ltd. Partnerships, etc.)			
Notes Receivable, Unsecured			
All unlisted stocks & Securities (Attach Sched.)			
Other Assets (detail)			
		<b>TOTAL LIABILITIES</b>	
		<b>NET WORTH</b>	
<b>TOTAL ASSETS</b>		<b>TOTAL LIABILITIES + NET WORTH</b>	

ANNUAL INCOME	AMOUNT	ANNUAL EXPENDITURES	AMOUNT	CONTINGENT LIABILITIES	
Employment - Applicant		Mortgage Payments (Sched. 5)		(Such as alimony, judgment, co-signer on loan, etc.)	
Spousal		Property Tax/Assessments		Description	Amount
Dividends/Bonds		Property & Hazard Insurance			
Interest		Utilities			
Gross Rentals		Rent			
Other (detail)		Revolving Credit (Sched. 4)			
		Installment Contracts (Sched. 4)			
Alimony, child support, etc.		Alimony, Child Support/Maint.			
		Income and Other taxes			
<b>TOTAL</b>		Health Insurance			
		Other(Detail)			
		<b>TOTAL EXPENSES</b>			

Names of Applicants: \_\_\_\_\_

**Schedule 1 - Stocks and Bonds (attach separate sheet if necessary)**

Number of Shares or Face Value Bonds	Description	Security in Name of:	Current Market Value	Bond Int. Rate	Bond Maturity	Annual Income
Totals:						

**Schedule 2 - IRA/Keogh/Pension Balance**

Plan in Name of:	Description	Holder of funds	Current Balance	Annual Contributions
Totals:				

**Schedule 3 - Real Estate and Buildings**

Parcel #	Location - Street	City	State	Title in the name of	Cost	Debt	Current Value
Totals:							

**Schedule 4 - Revolving Credit/Installment Debt/Notes (e.g. auto loans, credit cards, furniture loans)**

To Whom Payable	Balance Due	Date of Maturity	Monthly Payment	Annual Payment	Type of Obligation and Collateral if Secured
Totals:					

**Schedule 5 - Mortgages and Liens on Real Estate**

To Whom Payable	Balance Due	Date of Maturity	Monthly Payment	Annual Payment	Type of Obligation (1st, 2nd, Equity, etc.) and Property Secured
Totals:					

**Contingent Liabilities**

Have you any liability as a guarantor or endorser? (yes/no)  If so, please give details: \_\_\_\_\_

Have you ever declared bankruptcy? (yes/no) \_\_\_\_\_ If so, give date \_\_\_\_\_

Are you married? (yes/no) \_\_\_\_\_ If so, are any of the above assets separate property of your spouse? (yes/no) \_\_\_\_\_

If yes, give details: \_\_\_\_\_

Are there any suits, judgments, tax deficiencies or other claims pending or in process against you? (yes/no) \_\_\_\_\_

If yes, give details: \_\_\_\_\_

Have you made a will? (yes/no) \_\_\_\_\_ If so, who is named executor of the estate? \_\_\_\_\_

In submitting the foregoing statement, both the printed and written portions of which I/we have carefully read, I guarantee its accuracy with the intent that it be relied upon by the Owner. I warrant that I have no known obligations, direct or contingent, which have not been set forth hereon and that I/we have not knowingly been set forth hereon and that I have not knowingly withheld any material information of an adverse nature. I agree to notify the Owner immediately, in writing, of any unfavorable change in my financial condition. I hereby authorize you to investigate my credit record and to check statements I/we have made.

\_\_\_\_\_  
Signature Date

\_\_\_\_\_  
Signature Date