



## PERSONAL FINANCIAL STATEMENT

### APPLICANT

Please type or print clearly. Answer all items, if "none" so state.

Name of Borrower (Last, First, Middle)			Date of Birth	
Street Address		City, State Zip		
Home Phone	Cell Phone	Email Address		
Employer	Position	Years There	Annual Income	
Employer Street Address	City, State Zip	Work Phone		

### CO-APPLICANT

Please type or print clearly. Answer all items, if "none" so state.

Name of Borrower (Last, First, Middle)			Date of Birth	
Street Address		City, State Zip		
Home Phone	Cell Phone	Email Address		
Employer	Position	Years There	Annual Income	
Employer Street Address	City, State Zip	Work Phone		

### BALANCE SHEET

Assets		Liabilities	
1. Cash (Schedule A)	\$	8. Loans Payable (Schedule E)	\$
2. Marketable Securities (Schedule B)	\$	9. Mortgage Payable (Schedule F)	\$
3. Real Estate Owned - Market Value (Schedule C)	\$	10. Other Liabilities (Schedule G)	\$
4. Business Interest - Market Value (Schedule D)	\$		
5. Pensions, IRA, 401K, Keogh	\$		
6. Other Assets (Describe):	\$		
	\$		
	\$	11. TOTAL LIABILITIES	\$
	\$	12. NET WORTH	\$
7. TOTAL ASSETS	\$	13. TOTAL LIABILITIES & NET WORTH	\$

REMINDER - IF NOT COMPLETED JOINTLY, LIST ONLY YOUR INTEREST IN ANY JOINTLY HELD ASSETS & LIABILITIES

### SCHEDULE A - CASH BALANCES

Name & Location of Institution	Acct Type & Acct #	Ownership	Pledged (Yes/No)	Balance
				\$
				\$
				\$
				\$
				\$
				\$
TOTAL CASH BALANCES - LINE 1				\$

#### SCHEDULE B - MARKETABLE SECURITIES

Name/Description of Securities	# of Shares	Registered Owner(s)	Pledged (Yes/No)	Market Value
				\$
				\$
				\$
				\$
TOTAL MARKET VALUE - LINE 2				\$

#### SCHEDULE C - REAL ESTATE OWNED, list on additional sheet if necessary

Location & Type	Date Acquired	% Owned	Mortgaged (Yes/No)	Cost	Net Rental Income	Market Value
				\$		\$
				\$		\$
				\$		\$
				\$		\$
				\$		\$
TOTAL MARKET VALUE - LINE 3						\$

#### SCHEDULE D - BUSINESS INVESTMENTS

Name & Business Type	Date Acquired	% Owned	Cost	Cash Distributions		Net Equity
				Prior Year	Current Year	
			\$	\$	\$	\$
			\$	\$	\$	\$
			\$	\$	\$	\$
TOTAL NET EQUITY - LINE 4						\$

#### SCHEDULE E - LOANS PAYABLE

Lender	Original Amount	Interest Rate	Maturity Date	Collateral Description	Monthly Payment	Current Balance
	\$				\$	\$
	\$				\$	\$
	\$				\$	\$
	\$				\$	\$
	\$				\$	\$
TOTAL LOAN BALANCES - LINE 8						\$

#### SCHEDULE F - MORTGAGES PAYABLE

Lender	Original Amount	Interest Rate	Maturity Date	Collateral Description	Monthly Payment	Current Balance
	\$				\$	\$
	\$				\$	\$
	\$				\$	\$

	\$				\$	\$
TOTAL LOAN BALANCES - LINE 9						\$

### SCHEDULE G - OTHER LIABILITIES

Owed To	Original Amount	Interest Rate	Maturity Date	Collateral Description	Monthly Payment	Current Balance
	\$				\$	\$
	\$				\$	\$
	\$				\$	\$
	\$				\$	\$
	\$				\$	\$
	\$				\$	\$
	\$				\$	\$
TOTAL OTHER LIABILITIES - LINE 10						\$

### INCOME & EXPENSES

INCOME	Applicant	Co-Applicant	EXPENSES	Applicant	Co-Applicant
Salary	\$	\$	Personal Living Expenses	\$	\$
Rental/Business Income	\$	\$	Loans Payable	\$	\$
Other Income*	\$	\$	Other Expenses	\$	\$
TOTAL INCOME	\$	\$	TOTAL EXPENSES	\$	\$

Describe Source of Other Income Above	Describe Other Expenses Above

Have any judgments been entered against you? 
 Applicant: Yes No 
 Co-Applicant: Yes No

If yes, please describe: \_\_\_\_\_

Have you ever filed bankruptcy? 
 Applicant: Yes No 
 Co-Applicant: Yes No

If yes, when and where: \_\_\_\_\_

Tax Preparer: \_\_\_\_\_

Phone: \_\_\_\_\_

The information contained in this statement is provided for the purpose of obtaining or maintain credit with you on my/our behalf or on the behalf of persons, firms or corporations in whose behalf I/we may, either individually or jointly with other, execute a guaranty in your favor. I/we understand that you are relying on this information (including the designation made as to ownership of property) in deciding to grant or continue credit. I/we represent and warrant that the information provided is true and complete and that you may consider this statement as continuing to be true and correct until a written notice of change is give to you by me/us. I/we agree to notify you promptly of any such change. You are authorized to check the statements made on this form, run credit reports from any reporting agency, and to determine my/our credit worthiness.

APPLICANT SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_ CO-APPLICANT SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_