

LEASE APPLICATION / PERSONAL FINANCIAL STATEMENT

****FILL IN ALL BLANKS – WRITE "NO" OR "NONE" WHERE NECESSARY TO COMPLETE INFORMATION****

SUBJECT PROPERTY

Name of Property you are interested in: _____

Description/Address of Property: _____

PERSONAL INFORMATION

Full Legal Name of Applicant: _____ Male _____ Female _____
First Name Middle Initial Last Name

Applicant's Date of Birth: _____ Social Security Number _____

Applicant's Drivers License No. _____

Full Legal Name of Spouse: _____ Male _____ Female _____
First Name Middle Initial Last Name

Spouse's Date of Birth: _____ Social Security Number _____

Spouse's Drivers License No. _____

Present Home Address: _____
Street Address

Prior Home Address: _____
City State Zip Code

Street Address
City State Zip Code

Home Telephone: () Cellular Telephone: ()

Applicant's Current Employer: _____

Address: _____
Street City State Zip Code

Telephone: ()

Position Held: _____ Number of Years: _____

Applicant's Previous Employer: _____

Spouse's Employer: _____

Address: _____
Street City State Zip Code

Telephone: ()

Position Held: _____ Number of Years: _____

☐ Married ☐ Single ☐ Divorced ☐ Widowed

Ages: Self _____ Spouse _____ Children _____

PERSONAL FINANCIAL STATEMENT

The following is a true and accurate statement of the financial condition of the undersigned on _____, 20_____

SOURCE OF ANNUAL INCOME

Base Salary \$ _____
Spouse's Salary \$ _____
Business of Professional Income (net) \$ _____
Dividends and Interest Income \$ _____
Real Estate Cash Flow (net) \$ _____
Other Income – Itemize \$ _____
\$ _____
TOTAL ANNUAL INCOME \$ _____

ASSETS

Cash in Banks, Savings, Loans-see Sched 1 \$ _____
Investments: Stocks & Bonds - see Sched 2 \$ _____
Investment in Own Business (attach P&L) \$ _____
Investments in Other Businesses \$ _____
Acts & Notes Receivable-see Sched 3 \$ _____
Real Estate Owned-see Schedule 4 \$ _____
Automobiles:
Year ____ Make _____ \$ _____
Year ____ Make _____ \$ _____
Year ____ Make _____ \$ _____
Year ____ Make _____ \$ _____
Personal Property and Furniture \$ _____
Life Insurance (\$ _____)
Cash Surrender Value \$ _____
Other Assets – Itemize \$ _____
TOTAL ASSETS \$ _____

LIABILITIES

Mortgages Payable on Real Estate – See Schedule 5 \$ _____
Notes Payable: To Banks and Savings & Loans \$ _____
To Relatives or Others \$ _____
Installment Accts Payable: Automobile \$ _____
Other \$ _____
Unpaid Real Estate Taxes \$ _____
Unpaid Income Taxes \$ _____
Unpaid Chattel Mortgages \$ _____
Personal Property Mortgages \$ _____
Loans on Life Insurance Policies
(Incl. Premium Advances) \$ _____
Other Debts – Itemize: \$ _____
\$ _____
Total Liabilities \$ _____
Net Worth \$ _____
TOTAL LIABILITIES AND NET WORTH \$ _____
CONTINGENT LIABILITIES
As Endorser or Co-maker on Notes \$ _____
As Guarantor \$ _____
Alimony, Child Support or
Separate Maintenance Payments (Annual) \$ _____

PERSONAL FINANCIAL STATEMENT
SCHEDULE 1 – CASH: BANK/SAVINGS & LOAN ACCOUNTS

Pers	Coml	Cash Balance As Above Date	Name of Bank/Savings & Loan	Acct. No.
<input type="checkbox"/>	<input type="checkbox"/>	\$		
<input type="checkbox"/>	<input type="checkbox"/>	\$		
<input type="checkbox"/>	<input type="checkbox"/>	\$		
<input type="checkbox"/>	<input type="checkbox"/>	\$		
<input type="checkbox"/>	<input type="checkbox"/>	\$		
<input type="checkbox"/>	<input type="checkbox"/>	\$		

SCHEDULE 2 – READILY MARKETABLE SECURITIES AND OTHER INVESTMENTS

No. of Shares Or Bond Amounts	Where Listed	Description	Issued in Whose Name	Listed Securities Market Value Now Price Ea. Total	Unlisted Securities Value Now Price Ea. Total	Pledged to
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Total:

SCHEDULE 3 – ACCOUNTS RECEIVABLE: TRUST DEEDS AND MORTGAGES OWNED

Name of Payor	Street Address Type of Property	Original Amount	Unpaid Balance	How Held	Monthly Payment	1 st /2 nd Lien	Value of Property
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Total:

SCHEDULE 4 – REAL ESTATE OWNED

Assessor's Parcel No.	Street Address Type of Property	Title in Name of	Monthly Net Income Produced	Purchase Price Date Amount	Valuation Today
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Total:

SCHEDULE 5 – MORTGAGES ON REAL ESTATE

Assessor's Parcel No.	Payable To	Monthly Payments	Maturity Date	Unpaid Loan Balance
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Total:

OTHER INFORMATION

Are you a defendant in any legal action? ☐ yes ☐ no If yes, please give details: _____

Are you a guarantor, co-maker or endorser of anyone's debt? ☐ yes ☐ no If yes, please give details: _____

Are there any unpaid judgements against you? ☐ yes ☐ no If you, please give details: _____

Have your income tax returns ever been questioned by any governmental authority? ☐ yes ☐ no If yes, please give details: _____

Are there any assets encumbered or debts secured other than as indicated? ☐ yes ☐ no If yes, please give details: _____

Have you ever applied for or obtained credit under another name? ☐ yes ☐ no If yes, please give details: _____

Have you ever filed for bankruptcy or compromised a debt during the past 14 years? ☐ yes ☐ no If yes, please give details: _____

Are you a U.S. citizen? ☐ yes ☐ no

Have you prepared a business plan and/or cash flow projection for your business? ☐ yes ☐ no If yes, please give details: _____

Please state your business and intended use: _____

Do you have any other business interests? _____

Are you a partner or officer in any other business venture? ☐ yes ☐ no If yes, please give details: _____

List the name and phone numbers of landlord, bank, business & credit references: _____

Are there any other factors you consider important for the landlord to consider in evaluating your business history, creditworthiness or suitability for the referenced premises? ☐ yes ☐ no If yes, please give details: _____

The undersigned, for the purpose of procuring and maintaining a lease from Landlord, warrants the above (along with any attached schedule) to constitute a full, true and correct statement of the financial condition of the undersigned on the date shown below. Undersigned, if this statement is in his/her name only, affirms that none of the assets listed above are separate property of his/her spouse, if any, and that if community property is listed, all liabilities of the community are also listed. Undersigned agrees to notify Landlord immediately of the extent and character of any material adverse change in financial condition. I authorize the Landlord to check my credit references, to contact any consumer or business credit reporting agency, to verify my employment or to substantiate any of the information contained herein from whatever source it deems appropriate and hereby authorize the banks and other credit sources named above to release any information request to the Landlord. I authorize the Landlord to check any of the information now and at any time during the Lease Term including obtaining credit reports at any time during my tenancy.

This Personal Financial Statement is furnished for the purpose of inducing landlord to execute and maintain a lease agreement; I understand there are penalties under the law for knowingly making any false statements, or making a willful over-evaluation my personal financial condition for the purpose of influencing in any way Landlord's evaluation of my rental applications.

Dated: _____

Applicant

Dated: _____

Spouse of Applicant

Please send **LEASE APPLICATION / PERSONAL FINANCIAL STATEMENT** via facsimile to (408) 762-2028 or mail to Smith Commercial Management, Inc, 17500 Depot Street, Suite 170, Morgan Hill, CA 95037.