

LOAN SUMMARY

PERSONAL FINANCIAL STATEMENT
Confidential

BORROWER ☐ BROKER ☐ REALTOR ☐ OTHER ☐

PLEASE COMPLETE ALL SECTIONS. You are not required to give information as to your spouse or marital status. The availability of credit will be based on the information provided.

Please check one: I am applying for credit, ☐ Individually ☐ Jointly Date _____

Name _____ Address _____ SS# _____

Name _____ Address _____ SS# _____

Telephone _____ Loan Amount \$ _____ Estimated Value/ Purchase Price \$ _____

Subject Property Address _____

Subject Property Description _____

ASSETS	
Cash in Banks:	
Retirement Funds-Schedule A	
Accounts/Notes Receivable	
Real Estate Owned-Schedule B	
Real Estate Mortgages	
Automobiles/Personal Property	
Cash Value Insurance	
Other Assets	
TOTAL ASSETS	

LIABILITIES	
Notes Payable to banks - secured	
Notes Payable to Banks - unsecured	
Notes Payable to Others	
Accounts and Bills Due	
Unpaid Income Tax	
Other Unpaid Taxes and Interest	
Real Estate Mortgages –Schedule B	
Other	
TOTAL LIABILITIES	
NET WORTH (ASSETS MINUS LIABIL)	
TOTAL LIABILITIES NET WORTH	

TO INSURE YOUR PROTECTION UNDER FEDERAL LAW If additional space is needed attach statement of such information.

SOURCES OF INCOME	
Salary	
Bonus and Commissions	
Dividends	
Real Estate Income	
Alimony, Child Support	
Other Income - itemize	
TOTAL	

PERSONAL INFORMATION
Business Name:
Date of Birth:
Partner or Officer in any other Venture:

GENERAL INFORMATION (CIRCLE ONE)
Are Any Assets From Schedule A Pledged? Yes No
Are You a Defendant in Any Legal Action? Yes No

Contingent Liabilities	
Endorser, co maker, guarantor	
On Leases or Contracts	
Legal Claims	
Provision for Federal Income	
Other Special Debt	

General Information Continued		
Do you have a Will or Estate Plan?	Yes	No
Have You Ever Declared Bankruptcy?	Yes	No
Explain:		
Personal Bank Accounts carried at		

SCHEDULE A – STOCKS AND BONDS ALL SECURITIES all securities listed are mine and my possession except as shown			
Name of Issuing Corporation And Home of Security	Number of Shares Face Value of Bonds	Market Value	Registered in the Name of:

SCHEDULE B – REAL ESTATE Title to all real estate listed is in my/our name solely and unencumbered accept as shown hereon						
Property Location and Type	Title Held in Name of	Date Acquired	Cost	Market Value	Mortgage Balance	
						A
						B
						C
						D
						E
Mortgage Held By:		Monthly Payments		Has the Mortgage Been Current in the Last 12 Months?		
A _____		_____		<input type="checkbox"/> Yes	<input type="checkbox"/> No	
B _____		_____		<input type="checkbox"/> Yes	<input type="checkbox"/> No	
C _____		_____		<input type="checkbox"/> Yes	<input type="checkbox"/> No	
D _____		_____		<input type="checkbox"/> Yes	<input type="checkbox"/> No	
E _____		_____		<input type="checkbox"/> Yes	<input type="checkbox"/> No	

SHEDULE C – NOTES PAYABLE To Banks			
Name of Bank	Collateral	When Due	Amount
SCHEDULE C – NOTES PAYABLE To Others			
Name of Creditor	Origin of Debt	When Due	Amount

Broker or Referring Agent Information:

Broker Company Name: _____

Broker Individual Contact Name: _____

Broker Company Address: _____
(Location where check will be sent)

Broker Company Phone Number: () - _____

Broker Individual Phone Number: () - _____

Additional Notes: