

# PERSONAL FINANCIAL STATEMENT

Return completed form to: \_\_\_\_\_

Name \_\_\_\_\_ Name \_\_\_\_\_

SS# \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_ DL# \_\_\_\_\_ SS# \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_ DL# \_\_\_\_\_

Current Home Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_ Zip \_\_\_\_\_

Phone (Bus) (\_\_\_\_\_) \_\_\_\_\_ Phone (Hm) (\_\_\_\_\_) \_\_\_\_\_ Fax (\_\_\_\_\_) \_\_\_\_\_

Name of Business \_\_\_\_\_ Type Business/Occupation \_\_\_\_\_

State Where Incorporated \_\_\_\_\_ Corporate Tax I.D. # \_\_\_\_\_

Are any assets pledged? Yes  No  If yes, explain \_\_\_\_\_

Have you ever claimed Bankruptcy? Yes  No  If yes, explain \_\_\_\_\_

ASSETS		LIABILITIES AND NET WORTH	
Cash on Hand and in Banks (Schedule 1)	\$	Notes Payable to Banks	\$
U.S. Government Securities		Notes Payable	
Accounts, Loans & Notes Receivable (Schedule 2)		Rents Due	
Inventory & Fixtures		Taxes Due (Schedule 4)	
Stocks & Bonds (Schedule 3)		Liens on Real Estate (Schedule 4)	
Real Estate (Schedule 4)		Other Liabilities	
Automobiles - Number ( )			
Other Assets			
		TOTAL LIABILITIES	\$
		NET WORTH	\$
TOTAL ASSETS	\$	TOTAL LIABILITIES & NET WORTH	\$

SOURCE OF INCOME		CONTINGENT LIABILITIES	
Salary	\$	As Endorser	\$
Bonus & Commissions		On Leases or Contracts	
Dividends & Interest		Legal Claims	
Real Estate Income			
TOTAL INCOME	\$	TOTAL CONTINGENT LIABILITIES	\$

SCHEDULE 1 - BANKING RELATIONS						
Name & Location	Account Number	Cash Balance	Amount of Loan	Maturity of Loan	How Endorsed, Guaranteed or Secured	Loan Officer & Phone Number
		\$	\$			

SCHEDULE 2 - ACCOUNTS, LOANS & NOTES RECEIVABLE					
Name & Address of Debtor	Amount Owing	Age of Debt	Description or Nature of Debt	Description of Security Hold	Date Payment Expected
	\$				

SCHEDULE 3 - STOCKS & BONDS				SCHEDULE 4 - REAL ESTATE			
No. of Shares	Name of Security	Registered in Name of	Present Market Value	Address of Premises	Description	Present Market Value	Mortgage Balance
			\$			\$	\$

The undersigned certifies that the above information has been carefully read and is true and correct; and permission is hereby granted for Weingarten Realty Mgmt Co., its agents, affiliates and/or assigns to investigate the information contained herein by communicating with names of creditors supplied hereunder and/or by inquiring of an independent credit reporting service in order to verify and/or supply credit information.

**Signed:** \_\_\_\_\_ **Date:** \_\_\_\_\_  
**Signed:** \_\_\_\_\_ **Date:** \_\_\_\_\_