

# Personal Financial Statement

(Please print or type)

|                              |                     |                     |              |                               |              |
|------------------------------|---------------------|---------------------|--------------|-------------------------------|--------------|
| Name (Last, First, Middle)   |                     | Social Security No. |              | Date of Birth                 |              |
| Residence Address            |                     | City                | State        | Zip Code                      |              |
| How long at this address?    | Drivers License No. | Email               | Phone Number |                               |              |
| Previous Address             | City                | State               | Zip Code     | How long at previous address? |              |
| Employer                     | Employer Address    | City                | State        | Zip Code                      | Phone Number |
| Spouse (Last, First, Middle) |                     | Social Security No. |              | Date of Birth                 |              |
| Spouses Employer             |                     | Employer Address    | City         | State                         | Phone Number |

## CURRENT FINANCIAL CONDITION

| ASSETS   | LIABILITIES  |
|--|--|
| Cash on hand & in banks ..... \$ _____                                       | Accounts Payable ..... \$ _____  |
| IRA or other Retirement Account..... \$ _____                                | Notes Payable to Banks & others..... \$ _____<br>(Complete section 4)      |
| Accounts & Notes Receivable..... \$ _____                                    | Installment Accounts (auto)..... \$ _____                                  |
| Life Insurance-Cash surrender value only ..... \$ _____                      | Loan on Life Insurance..... \$ _____                                       |
| Stocks & Bonds ..... \$ _____<br>(Complete Section 1)                        | Mortgages on Real Estate ..... \$ _____<br>(Complete section 4)            |
| Real Estate..... \$ _____<br>(Complete section 2)                            | Unpaid Taxes ..... \$ _____<br>(Complete section 4)                        |
| Trust Deeds & Mortgages ..... \$ _____<br>(Complete section 3)               | Other Liabilities (credit accounts) ..... \$ _____<br>(Complete section 4) |
| Other Personal Property ..... \$ _____<br>(Complete section 4)               | Total Liabilities ..... \$ _____   |
| Other Assets ..... \$ _____<br>(Complete section 4)                          | Net Worth ..... \$ _____   |
| TOTAL ASSETS \$ _____  | TOTAL \$ _____   |
| ANNUAL INCOME  | ANNUAL EXPENDITURES  |
| Salary or wages ..... \$ _____   | Property Taxes & Assessments ..... \$ _____                                |
| Dividends & Interest..... \$ _____   | Federal & State Income Taxes ..... \$ _____                                |
| Rentals (gross)..... \$ _____  | Real Estate Loan Payments ..... \$ _____                                   |
| Business or professional income (net) ..... \$ _____<br>(Complete Section 5) | Payments on contracts & other notes ..... \$ _____                         |
| Other Income..... \$ _____<br>(Complete Section 5)                           | Insurance Premiums..... \$ _____   |
| TOTAL \$ _____   | Estimated Living Expenses ..... \$ _____                                   |
|  | Other (Alimony, child support, maintenance) ..... \$ _____                 |
|  | TOTAL \$ _____   |

| <b>SECTION 1. Stocks &amp; Bonds</b> (Use attachments if necessary, each attachment must be identified as a part of this statement and signed) |             |                        |   |              |
|--|-------------|------------------------|---|--------------|
| No. of shares or par value   | Description | Issued in the name of: | Joint Tenancy, Tenancy in Common -or- Common Property | Market Value |
|  |             |                        |   |              |
|  |             |                        |   |              |
|  |             |                        |   |              |
|  |             |                        |   |              |

| <b>SECTION 2. Real Estate Owned</b> (List each parcel separately. Use attachments if necessary, each attachment must be identified as a part of this statement and signed) |            |            |            |
|--|------------|------------|------------|
|  | Property A | Property B | Property C |
| Type of Property   |            |            |            |
| Address  |            |            |            |
| Joint Tenancy, Tenancy in Common -or- Common Property  |            |            |            |
| Original Cost  |            |            |            |
| Present Market Value   |            |            |            |
| Mortgage Holder Name & Address   |            |            |            |
| Mortgage Balance   |            |            |            |
| Amount of payment per month/year   |            |            |            |

| <b>SECTION 3. Trust Deeds &amp; Mortgages Owned</b> |                               |                |   |       |                 |                   |
|---|-------------------------------|----------------|---|-------|-----------------|-------------------|
| Name of Payer                                       | Address & Type of Improvement | Unpaid Balance | Joint Tenancy, Tenancy in Common -or- Common Property | Terms | 1st or 2nd Lien | Value of Property |
|   |                               |                |   |       |                 |                   |
|   |                               |                |   |       |                 |                   |
|   |                               |                |   |       |                 |                   |
|   |                               |                |   |       |                 |                   |

| <b>SECTION 4. Details relative to other important assets and liabilities.</b> |
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| <b>SECTION 5. Description of other income in Section 1.</b> |
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The undersigned applicant hereby declares that the representations of fact contained in the foregoing applications are considered part of my lease and are true and correct. I agree that if any information herein contained is false, the lease made on the strength of this application may, at the option of the landlord, be terminated at any time. Applicant(s) hereby authorizes verification of references including, but not limited to the obtaining of a credit report.

Signature of Applicant \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_

Signature of Applicant \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_