



PERSONAL FINANCIAL STATEMENT

Financial Statement as of: _____ (Date)	TYPE OF CREDIT - CHECK THE APPROPRIATE BOX <input type="checkbox"/> Individual (Provide your financial information only.) <input type="checkbox"/> Joint, with _____ <input type="checkbox"/> Information on separate financial statement. Relationship: _____
APPLICANT	CO-APPLICANT
Name:	Name:
Street Address:	Street Address:
City: State: Zip Code:	City: State: Zip Code:
Date of Birth: Social Security Number:	Date of Birth: Social Security Number:
Home Phone: Work Phone: Cell Phone:	Home Phone: Work Phone: Cell Phone:
Employer: Address:	Employer: Address:
Position/Title: How Long:	Position/Title: How Long:
Dependents (Include Self):	Dependents (Include Self):
Marital Status Unmarried* <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> <small>* includes single, divorced, widowed</small>	Marital Status Unmarried* <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> <small>* includes single, divorced, widowed</small>

ASSETS:		LIABILITIES:	
Cash (Schedule 1)	\$	Notes payable to Financial Institutions (Schedule 6)	\$
Securities (Schedule 2)	\$	Notes payable to Others (Schedule 6)	\$
Life Insurance Cash Value (Schedule 3)	\$	Credit Card Accounts (Schedule 7)	\$
Notes and Contracts Held by You (Schedule 4)	\$	Loans against Life Insurance Policies (Schedule 3)	\$
Real Estate: Personal Residence (Schedule 5)	\$	Installment/Auto Loans (Schedule 6)	\$
Other Real Estate (Schedule 5)	\$	Mortgages on Personal Residence (Schedule 5)	\$
Pension & Retirement Accounts, including IRA's	\$	Mortgages on Other Real Estate (Schedule 5)	\$
Automobiles (Describe: Year/Make/Model)	\$	Taxes Due	\$
	\$	Other Liabilities (Described):	\$
Personal Property	\$		\$
Other Assets (Describe)	\$		\$
	\$	Total Liabilities	\$
Total	\$	(Total Assets Less Total Liabilities) Net Worth	\$

Attach additional pages if necessary. Additional pages must be signed and dated by all parties to this financial statement.

ANNUAL INCOME	Applicant	Co-Applicant	PLEASE ANSWER EACH QUESTION (Yes or No)	
Salary	\$	\$		Applicant Co-Applicant
Bonuses/Commissions	\$	\$	Are you a co-maker, Endorser, or Guarantor for any other person's debt or obligation?	
Dividends/Interest	\$	\$		
Net Real Estate Rental Income	\$	\$	Income Tax Return filed thru what date?	
Income from alimony, child support, or maintenance payments need not be entered unless you want it considered as a basis for repayment.	\$	\$	Have you ever gone thru Bankruptcy or had a judgment against you in the last 10 years? If so, please attach explanation and dates of such actions.	
Other (list)	\$	\$	Are you a defendant in any suit or legal action?	
Total	\$	\$	Have you made a will?	

Signature

Date

Signature

Date

SCHEDULE 1 / CASH ON HAND AND IN BANKS		
Name of Bank or Financial Institution	Type of Account	Account Balance
		\$
		\$
		\$
Total		\$

SCHEDULE 2 / SECURITIES OWNED				
Description	# Shares	Par Value	Description (Indicate if Listed or Unlisted)	Current Market Value
				\$
				\$
				\$
Total				\$

SCHEDULE 3 / LIFE INSURANCE				
Insurance Company	Face Value of Policy	Cash Value of Policy	Insured / Beneficiary	Loans
				\$
				\$
Total				\$

SCHEDULE 4 / RECEIVABLES DUE ME (US) ON NOTES & CONTRACTS I (WE) OWN					
Name of Debtor	Maturity	Interest Rate	Security	Monthly Payment	Balance Due
				\$	\$
				\$	\$
				\$	\$
Total					\$

SCHEDULE 5 / REAL ESTATE OWNED								
Description & Location of Property	Title in Name of % Owned	and	Date Acquired	Purchase Price	Current Mkt. Value	Date Due	Monthly Payment	Balance Due
							\$	\$
							\$	\$
							\$	\$
							\$	\$
Total							\$	\$

SCHEDULE 6 / NOTES PAYABLE TO FINANCIAL INSTITUTIONS/OTHERS & AUTO/INSTALLMENT LOANS					
Name of Creditor	Collateral	Maturity Date	Monthly Payment	Balance Due	
			\$	\$	
			\$	\$	
			\$	\$	
			\$	\$	
Total			\$	\$	

SCHEDULE 7 / CREDIT CARD ACCOUNTS		
Name of Creditor	Monthly Payment	Balance Due
	\$	\$
	\$	\$
	\$	\$
	\$	\$
Total		\$

This information and the information provided on all accompanying financial statements and schedules is provided for the purpose of obtaining credit or the Applicant(s) or for the purpose of Applicant(s) guaranteeing credit for others. Applicant(s) acknowledge that representations made in this Statement will be relied on by the Creditor in its decision to grant such credit. This Statement is true and correct in every detail and accurately represents the financial condition of the Applicant(s) on the date given herein. You are authorized to make all inquiries you deem necessary to verify the accuracy of the information contained herein and to determine the creditworthiness of the undersigned. Applicant(s) will promptly notify Creditor of any subsequent changes which would affect the accuracy of this Statement. Creditor is further authorized to answer any questions about Creditor's credit experience with Applicant(s). Applicant(s) are aware that any knowing or willful false statements regarding the value of the above property for purposes of influencing the actions of Creditor can be a violation of federal law 18 U.S.C. sec 1014 and may result in a fine or imprisonment or both.

By signing below, each representative of the Applicant declares that he/she has read and understands the statement above.

Signature: _____ Date: _____ Signature: _____ Date: _____
Applicant Co-Applicant