

# PERSONAL FINANCIAL STATEMENT



I may apply for a credit extension, loan or other financial accommodation alone or together with someone else, ("co-applicant"). If I apply with a co-applicant and our combined assets and debts can meaningfully and fairly be presented together, the co-applicant and I may complete this statement and any supporting schedules jointly, otherwise separate forms and schedules are required.

Personal financial Statement as of: \_\_\_\_\_

Applicant		**Co-Applicant	
Full Name		Full Name	
Street Address		Street Address	
City/State/Zip		City/State/Zip	
Social Security #		Social Security #	
Since	<input type="checkbox"/> Own <input type="checkbox"/> Rent \$	Since	<input type="checkbox"/> Own <input type="checkbox"/> Rent \$
Cell Phone #	Date of Birth	Cell Phone #	Date of Birth
Residence Phone #	Work #	Residence Phone #	Work #
Employer		Employer	
Address		Address	
Position/Title	Since	Position Title	Since
Dependents/Include Self/Ages		Dependents/Include Self/Ages	
Marital Status* <input type="checkbox"/> Unmarried <input type="checkbox"/> Married <input type="checkbox"/> Separated		Marital Status* <input type="checkbox"/> Unmarried <input type="checkbox"/> Married <input type="checkbox"/> Separated	
E-mail address:		<b>**Do not provide this information if your application is for individual credit.</b>	

Assets	Joint-J Sole-S	Amount (\$)	Liabilities	Joint-J Sole-S	Amount (\$)
Cash (Schedule 1)			Notes Payable		
Securities (Schedule 2)			Notes Payable-Bank & Others (Schedule 7)		
Value of My Companies (List)			Insurance Loans (Schedule 3)		
			Installment Loans and Contracts		
Life Insurance Cash Value (Schedule 3)					
Other assets			Other Liabilities		
Real Estate (Schedule 5)			Mortgages (Schedule 5)		
Mortgages and Contracts I Own (Schedule 4)			Credit Cards		
Profit Sharing, Pension and IRA Accounts (Schedule 6)			Other Liabilities (Describe)		
Automobiles (Describe)					
Personal Property					
Other Tangible Assets (Describe)					
			<b>Total Liabilities \$</b>		
<b>Total Assets \$</b>			<b>(Total Assets Less Total liabilities)</b>	<b>Net Worth \$</b>	

Annual Income	Applicant	Co-Applicant	Contingent Liabilities	
Salary			As Endorser	
Commissions			As Guarantor	
Dividends			Lawsuits	
Interest			For Taxes	
Rentals			Other (Detail)	
Alimony/Child Support or maintenance (you need not show this unless you wish us to consider it.)				
Other			<input type="checkbox"/> Check here if "None"	
Total Income			Total Contingent Liabilities	

**Schedule 1 CASH, SAVINGS, CERTIFICATES, AND MONEY MARKET ACCOUNTS**

Name of Bank, Financial Institution or Brokerage Firm	Type of Account	In Whose Name?	Pledged?	Account Balance (\$)
Total \$				

**Schedule 2 SECURITIES OWNED**

No. of Shares or Bond Amount	Description	Pledged?	In Whose Name(s) Registered	Cost (\$)	Present Market Value	L-Listed U-Unlisted Exchange	Controlled-C Restricted-R
Total \$							

**Schedule 3 LIFE INSURANCE**

Insurance Company	Insured	Beneficiary	Face Value of Policy (\$)	Cash Value of Policy (\$)	Loans (\$)
Total \$					

**Schedule 4 RECEIVABLES, MORTGAGES AND/OR CONTRACTS I OWN**

Name of Debtor	Description of Property	First Lien or Second Lien	Date of Maturity	Repayment Terms	Balance Due (\$)
				per	
				per	
				per	
				<b>Total \$</b>	

**Schedule 5 REAL ESTATE OWNED**

PERSONAL RESIDENCE Property Address	Legal Owner	Purchase Year Price	Market Value (\$)	Present Loan Balance (\$)	Interest Rate	Loan Maturity Date	Monthly Income (\$)	Monthly Payment (\$)	Lender	
INVESTMENT PARTNERSHIPS Property Address	Owner-ship %	Legal Owner	Purchase Year Price	Market Value (\$)	Present Loan Balance (\$)	Interest Rate	Loan Maturity Date	Monthly Income (\$)	Monthly Payment (\$)	Lender
			<b>Total \$</b>							

**Schedule 6 PROFIT SHARING, PENSION, AND IRA ACCOUNTS (INCLUDES 401 K)**

Name of Institution or Plan	Type of Account	Account Balance (\$)	Amount Totally Vested (\$)	Loans (\$)
		<b>Total \$</b>		

**Schedule 7 NOTES PAYABLE BANKS AND OTHERS**

To Whom Payable	Address	Interest Rate	Collateral(C) or Unsecured (U)	How Payable	Maturity Date	Unpaid Balance (\$)
				\$ per		
				\$ per		
				\$ per		
				\$ per		
				\$ per		
				\$ per		
				\$ per		
				\$ per		
						<b>Total \$</b>

