

PERSONAL FINANCIAL STATEMENT

Note: This form is to be used for Personal Financial Statement only. NOT TO BE USED FOR BUSINESS STATEMENTS.

Date: ____ / ____ / ____

APPLICANT			CO-APPLICANT		
Full Name			Full Name		
Street Address			Street Address		
City/State/Zip			City/State/Zip		
County			County		
Since	Own <input type="checkbox"/>	Rent \$	Since	Own <input type="checkbox"/>	Rent \$
Previous Address (if less than 5 years at present)			Previous Address (if less than 5 years at present)		
City/State/Zip			City/State/Zip		
Since	Owned <input type="checkbox"/>	Rented <input type="checkbox"/>	Since	Owned <input type="checkbox"/>	Rented <input type="checkbox"/>
Social Security #		Date of Birth	Social Security #		Date of Birth
Phone: Residence		Work	Phone: Residence		Work
Marital Status *			Marital Status *		
<input type="checkbox"/> Unmarried <input type="checkbox"/> Married <input type="checkbox"/> Separated			<input type="checkbox"/> Unmarried <input type="checkbox"/> Married <input type="checkbox"/> Separated		

ASSETS		LIABILITIES	
Cash (Schedule 1)		Short Term Notes Due Financial Insts. (Schedule 7)	
Securities (Schedule 2)		Short Term Notes Due to Others (Schedule 7)	
Life Insurance Cash Value (Schedule 3)		Credit Accounts and Bills Due (Schedule 8)	
Mortgages and Contracts Held by You (Schedule 4)		Insurance Loans (Schedule 3)	
Homestead (Schedule 5)		Installment Loans and Contracts (Schedule 7)	
Other Real Estate (Schedule 5)		Mortgages on Home (Schedule 5)	
Profit Sharing & Pension (Schedule 6)		Mortgages on Other Real Estate (Schedule 5)	
Retirement Accounts, include IRA Accts. (Schedule 1)		Taxes	
Automobile (Describe)		Other Liabilities (Describe)	
Personal Property			
Other Assets (Describe)			
		Total \$	
Total \$		(Total Assets Less Total Liabilities) Net Worth \$	

* ANNUAL INCOME	APPLICANT	CO-APPLICANT	PLEASE ANSWER EACH QUESTION (Yes / No)	APP.	CO-APP
Salary			Are you a Co-Maker, Endorser or Guarantor of any other person's debt?		
Bonuses/Commissions					
Dividends/Interest			Are you a defendant in any suit or legal action?		
Net Real Estate Income					
* Income from alimony, child support, or maintenance payments need not be entered unless you want it considered as a base for repayment.			Have you ever gone through bankruptcy or had a judgment against you?		
Other (List)			Have you made a will?		
Total \$					

SCHEDULE 1 / CASH, SAVINGS, CERTIFICATES AND IRA ACCOUNTS

Name of Bank or Financial Institution	Type of Account	Acct. Balance
Total \$		

SCHEDULE 2 / SECURITIES OWNED

Par Value or No. of Shares	Description	Registered in Name(s) of	Listed or Unlisted	Current Market Value
Total \$				

SCHEDULE 3 / LIFE INSURANCE

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

SCHEDULE 4 / RECEIVABLES DUE TO ME ON MORTGAGES AND CONTRACTS I OWN

Name of Debtor	Description of Property	First Lien or Second Lien	Date of Maturity	Repayment Terms	Balance Due
				per	
				per	
				per	
Total \$					

SCHEDULE 5 / REAL ESTATE OWNED

Property Description	Name of Creditor	Year Acquired	Purchase Price	Mortgage Balance	Date of Maturity	Repayment Terms	Current Market Value
						per	
						per	
						per	
						per	
						per	
						per	
Insurance Co.: _____ Agent: _____						Total \$	

SCHEDULE 6 / PROFIT SHARING AND PENSION

Name of Institution	Type of Account	Account Balance	Amount Totally Vested	Loans
Total \$				

SCHEDULE 7 / INSTALLMENTS, CREDIT LINES AND NOTES

Name of Creditor	Collateral	Date of Maturity	Repayment Terms	Balance Due
			per	
			per	
			per	
			per	
Total \$				

SCHEDULE 8 / CREDIT ACCOUNTS, BILLS DUE, ALIMONY/CHILD SUPPORT, DAYCARE, ETC.

Name of Company	Repayment Terms	Balance Due
	per	
	per	
	per	
	per	
	per	
Total \$		

*I/We agree the information is presented as a true and accurate statement of my/our financial condition on the date indicated.

Applicant's Signature Date

Co-Applicant's Signature Date