



Personal Financial Statement

The following personal financial statement is provided to help in preparing and submitting a request.

PERSONAL FINANCIAL STATEMENT			
Financial Condition as of: _____, 20_____ Complete this form for: (1) each proprietor or (2) each partner who owns 20% or more interest or (3) each stockholder owning 20% or more interest or (4) any person providing guarantee on the loan.			
Applicant:		Co-Applicant:	
SS #:		SS #:	
DOB:		DOB:	
Address:		Address:	
City:		City:	
State:	Zip:	State:	Zip:
Home Phone:		Home Phone:	
Business Name of Applicant or Borrower:			
Name, address and phone number of nearest relative not living with applicant:			
Cash Accounts – Section 1	\$	Accounts Payable	\$
IRA/Retirement Funds	\$	Notes Payable – Section 5	\$
Accounts/Notes Receivable	\$	Installment Loans (Auto) Monthly Payment \$_____	\$
Cash Surrender Value of Life Insurance	\$	Installment Loans (Other) Monthly Payment \$_____	\$
Marketable Securities/ Brokerage Accts – Section 2	\$	Loan(s) on Life Insurance	\$
Value of Closely Held Businesses	\$	Real Estate Mortgages – Section 4	\$
Real Estate Holdings – Section 3	\$	Unpaid Taxes	\$
Autos – Present Value	\$	Other Liabilities	\$
Personal Furnishings	\$	Other Liabilities	\$
Other Assets (please define)	\$	TOTAL LIABILITIES	\$
TOTAL ASSETS	\$	NET WORTH	\$

SOURCES OF INCOME			CONTINGENT LIABILITIES (if any)	
	Applicant	Co-Applicant		
Salary	\$	\$	As Guarantor or Co-Maker	\$
Net Invest Income	\$	\$	Any Legal Claims & Judgments	\$
Real Estate Income	\$	\$	Unpaid Federal Income Taxes	\$
Other Income <small>Alimony or child support payments need not be disclosed in "Other Income" unless it is desired to have such payments counted toward total income.</small>	\$	\$	Other Special Debt	\$

Description of Other Income:

Description of Contingent Liabilities:

SECTION 1 – CASH ACCOUNTS

Account Title	Financial Institution	Balance	Pledged
		\$	Y / N
		\$	Y / N
		\$	Y / N
		\$	Y / N

SECTION 2 – MARKETABLE SECURITIES / BROKERAGE ACCOUNTS

# of Shares	Name of Security	Cost	Market Value Exchange	Date of Value	Total Value
		\$	\$		\$
		\$	\$		\$
		\$	\$		\$
		\$	\$		\$

SECTION 3 – REAL ESTATE HOLDINGS

Name in which Property is Titled	Address	Homestead, Residential or Commercial	Date Acquired	Original Cost	Estimated Value
				\$	\$
				\$	\$
				\$	\$
				\$	\$

SECTION 4 – REAL ESTATE LOANS PAYABLE

Mortgage Holder	Original Mtg Amount	Current Mtg Balance	Monthly Payment	Monthly Rental Income
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$

SECTION 5 – NOTES PAYABLE

Note Holder	Original Balance	Current Balance	Monthly Payment	Collateral
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	

The following is applicable to the person(s) signing this Personal Financial Statement

	Applicant	Co-Applicant
Are you a United States Citizen?	Y / N	Y / N
Are you a defendant in any suits or legal actions?	Y / N	Y / N
Have you ever declared bankruptcy?	Y / N	Y / N
Have any judgments ever been entered against you?	Y / N	Y / N
Do you have ownership in or are you a partner in any other corporation or partnership?	Y / N	Y / N
Do you pay alimony, child support or separate maintenance payments? If yes, amount \$_____	Y / N	Y / N
If you answered yes to question 2 – 6 please provide details:		

Signature:	Date:
Signature:	Date: