PERSONAL FINANCIAL STATEMENT

SECTION 1 – INDIVIDUAL INFORMATION (Type or Print)		**SECTION 2 – OTHER PARTY INFORMATION** (Type or Print)	
Name		Name	
Residence Address		Residence Address	
City, State & Zip		City, State & Zip	
Position or Occupation		Position or Occupation	
Business Name		Business Name	
Business Address		Business Address	
City, State & Zip		City, State & Zip	
Home Phone No.	Business Phone No.	Home Phone No.	Business Phone No.

SECTION 3 – STATEMENT OF FINANCIAL CONDITION AS OF

ASSETS (Do not include Assets of doubtful value)	**In Dollars** (Omit Cents)	**LIABILITIES**	**In Dollars** (Omit Cents)
Cash on Hand and in Banks		Notes Payable to Banks –	
U.S. Gov't. & Marketable Securities – see Schedule A		Notes Payable to Banks –	
Non-Marketable Securities – see Schedule B		Due to Brokers	
Securities Held by Broker in Margin Accounts		Amounts Payable to Others – Secured	
Restricted or Control Stocks		Amounts Payable to Others – Unsecured	
Partial Interest in Real Estate Equities – see Schedule C		Accounts and Bills Due	
Real Estate Owned – see Schedule D		Unpaid Income Tax	
Loans Receivable		Other Unpaid Taxes and Interest	
Automobiles and Other Personal Property		Real Estate Mortgages Payable – see Schedule D	
Cash Value – Life Insurance – see Schedule E		Other Debts – Itemize:	
Other Assets – Itemize:			
		TOTAL LIABILITIES	
		NET WORTH	
TOTAL ASSETS		**TOTAL LIABILITIES AND NET WORTH**	

SOURCES OF INCOME FOR YEAR ENDED _____ PERSONAL INFORMATION

Salary, Bonuses, & Commissions (Yearly)	
Dividends	
Real Estate Income	
Other Income **(Alimony, child support, or separate maintenance income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation)**	
TOTAL	

CONTINGENT LIABILITIES

Do you have any contingent liabilities? If so, describe:	
As Endorser, Co-Maker, or Guarantor?	$
On Leases or Contracts?	$
Legal Claims	$
Other Special Debt	$
Amount of Contested Income Tax Liens	$

Do you have a will? ☐ Yes ☐ No	If yes, name of executor:
Are you a partner or officer in any other venture? If so, describe:	
Are you obligated to pay alimony, child support or separate maintenance payments? If so, describe:	
Are any assets pledged other than as described on schedules? If so, describe:	
Income tax settled through (date):	
Are you a defendant in any suits or legal actions?	
Personal bank accounts carried at:	
Have you ever been declared bankrupt? If so, describe:	

(COMPLETE SCHEDULES AND SIGN ON NEXT PAGE)
(USE ADDITIONAL SCHEDULES IF NECESSARY)

SCHEDULE A – U.S. GOVERNMENTS & MARKETABLE SECURITIES

Number of Shares or Face Value (Bonds)	Description	In Name of	Are These Pledged?	Market Value

SCHEDULE B – NON-MARKETABLE SECURITIES

Number of Shares	Description	In Name of	Are These Pledged?	Source of Value	Value

SCHEDULE C – PARTIAL INTERESTS IN REAL ESTATE EQUITIES

Address & Type of Property	Title in Name of	% of Ownership	Date Acquired	Cost	Market Value	Mortgage Maturity	Mortgage Amount

SCHEDULE D – REAL ESTATE OWNED

Address & Type of Property	Title in Name of	Date Acquired	Cost	Market Value	Mortgage Maturity	Mortgage Amount

SCHEDULE E – LIFE INSURANCE CARRIED, INCLUDING N.S.L.I. AND GROUP INSURANCE

Name of Insurance Company	Owner of Policy	Beneficiary	Face Amount	Policy Loans	Cash Surrender Value

SCHEDULE F – BANKS OR FINANCE COMPANIES WHERE CREDIT HAD BEEN OBTAINED

Name & Address of Lender	Credit in the Name of	Secured or Unsecured?	Original Date	High Credit	Current Balance

The information contained in this statement is provided for the purpose of obtaining, or maintaining credit with you on behalf of the undersigned, or persons, firms or corporations in whose behalf the undersigned may either severally or jointly with others, execute a guaranty in your favor. Each undersigned understands that you are relying on the information provided herein (including the designation made as to ownership of property) in deciding to grant or continue credit. Each undersigned represents and warrants that the information provided is true and complete and that you may consider this statement as continuing to be true and correct until a written notice of a change is given to you by the undersigned. You are authorized to make all inquiries you deem necessary to verify the accuracy of the statements made herein, and to determine my/our credit-worthiness. You are authorized to answer questions about your credit experience with me/us.

Signature (Individual) /S/

S.S. No. _____ Date of Birth _____

Signature (Other Party) /S/

Date Signed _____ S.S. No. _____ Date of Birth _____