

Personal Financial Statement

SECTION 1-INDIVIDUAL INFORMATION <small>(Type or Print)</small>	SECTION 2-OTHER PARTY INFORMATION <small>(Type or Print)</small>
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
Res. Phone	Res. Phone
Bus. Phone	Bus. Phone

SECTION 3-STATEMENT OF FINANCIAL CONDITION AS OF _____ 20____			
ASSETS <small>(Do not include Assets of doubtful value)</small>	In Dollars <small>(Omit cents)</small>	LIABILITIES	In Dollars <small>(Omit cents)</small>
Liquid Assets		Credit Card Balances (nonbusiness)	
Cash - Personal			
Cash - Business		Notes Payable Bank	
Certificate of Deposit			
Other:		Unpaid Tax	
Marketable Securities			
Stocks / Mutual Funds - Schedule A		Other Liabilities	
Retirement Accounts		Other:	
IRA		Other:	
401K		Other:	
Life Insurance - Cash Value		Other:	
Other:			
Interest In Private Business		Real Estate - Personal	
List on Schedule B		Mortgage	
Real Estate		HELOC	
Personal Use - Schedule C		Real Estate - Investment	
Investment - Schedule D		Mortgage	
Other Assets		HELOC	
Automobiles			
Personal Property		Automobile Loan	
Loan Receivable			
Other:			
Miscellaneous:			
List on Schedule E			

TOTAL \$ _____ ASSETS: _____ DATE:	TOTAL LIABILITIES: \$ _____
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(COMPLETE SCHEDULES AND SIGN ON REVERSE SIDE)

SCHEDULE A - U.S. GOVERNMENTS & MARKETABLE SECURITIES

Number of Shares	Description	In Name Of	Are These Pledged?	Market Value

SCHEDULE B - PRIVATE BUSINESS OWNED

% of Business Owned	Name of Business	Business Description	Are These Pledged?	Annual Revenue	Value

SCHEDULE C - REAL ESTATE - PERSONAL

Address	Title In Name Of	% Of Ownership	Date Acquired	Cost	Market Value	Mortgage Maturity	Mortgage Amount

SCHEDULE D - REAL ESTATE - INVESTMENT

Address	Title In Name Of	Date Acquired	Cost	Market Value	Rental Income	Mortgage Payment

SCHEDULE E - Miscellaneous Assets / Liabilities

Name	Description	Date Acquired	% of Ownership	Pledged?	Market Value

SCHEDULE F-BANKS OR FINANCE COMPANIES WHERE CREDIT HAS 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, including personal credit report, to verify the accuracy of the statements made herein, and to determine my/our creditworthiness. You are authorized to answer questions about your credit experience with me/us.

Date Signed: _____

Signature (Individual) _____
 S.S. No. _____ Date of Birth _____

Signature (Other Party) _____
 S.S. No. _____ Date of Birth _____