

PERSONAL FINANCIAL STATEMENT

Name _____

Address _____

STATEMENT OF ASSETS AND LIABILITIES AS OF _____, _____

ASSETS		LIABILITIES	
Cash on hand and in Banks		Notes payable to Banks – Unsecured	
U.S. Gov. Securities – see schedule 1		Notes payable to Banks – Secured (automobiles, etc.)	
Marketable Securities – see schedule 1		Other notes payable	
Unlisted Securities – see schedule 2		Accounts and bills payable	
Accounts and Notes Receivables (collectable) – see schedule 3		Income tax payable	
Automobiles and other Personal Property		Other payables	
Cash Value Life Insurance		Real Estate Mortgage(s) payable – schedule 4 or 5	
Real Estate not wholly owned – see schedule 4			
Real Estate owned – see schedule 5			
Other assets – itemize			
		TOTAL LIABILITIES	
		NET WORTH	
TOTAL ASSETS		TOTAL LIABILITIES & NET WORTH	

INCOME	
Salary	\$
Bonus	\$
Dividends and interest	\$
Real Estate Income	\$
Other income	\$
TOTAL	\$

CONTINGENT LIABILITIES	GENERAL INFORMATION
Endorser, comaker or guarantor <input type="checkbox"/> yes <input type="checkbox"/> no	Are any assets pledged? <input type="checkbox"/> yes <input type="checkbox"/> no If yes, attach explanation
Defendant in any law suit or legal action? <input type="checkbox"/> yes <input type="checkbox"/> no	Partner or officer in any other venture <input type="checkbox"/> yes <input type="checkbox"/> no If yes, list on schedule 2
Other <input type="checkbox"/> yes <input type="checkbox"/> no	Married <input type="checkbox"/> Ages ____ & ____ Single <input type="checkbox"/>
If yes to any of the above, attach explanation	Have you ever declared bankruptcy? <input type="checkbox"/> yes <input type="checkbox"/> no If yes, attach explanation

SCHEDULE 1 - U.S. GOVERNMENT AND MARKETABLE SECURITIES (Attach Copy of Brokers Statement(s) if more than 4 items)

Number of Shares or Face Value (Bonds)	Description	Market Value

SCHEDULE 2 - UNLISTED SECURITIES

Description	Held in Name of	% of Ownership	Book Value	Market Value

SCHEDULE 3 - ACCOUNTS, NOTES AND LOANS RECEIVABLE

From Whom Due	Maturity or Due Date	Amount

SCHEDULE 4 - PARTIAL INTEREST IN REAL ESTATE

Address & Type Of Property	Title in Name Of	% Of Ownership	Your Share Cost	Your Share Market Value	Your Share Mortgage	Your Share Monthly Income

SCHEDULE 5 - REAL ESTATE 100% OWNED

Address & Type of Property	Cost	Market Value	Mortgage Amount	Monthly Income

SCHEDULE 6 - ACCOUNTS, NOTES, AND TERM DEBT PAYABLE

To Whom Due	Secured		Describe Security and/or Purpose of Borrowing	Maturity or Due Date	Amount
	Yes	No			

SCHEDULE 7 - OTHER IMPORTANT DETAILS RELATIVE TO ASSETS OR LIABILITIES

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 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 creditworthiness. You are authorized to answer questions about your credit experience with me/us.

Date Signed _____, _____

Signature (Individual) _____

Social Security Number _____

Signature (Spouse) _____

Social Security Number _____