

# PERSONAL FINANCIAL STATEMENT

NAME: \_\_\_\_\_ SSN: \_\_\_\_\_  
 HOME ADDRESS: \_\_\_\_\_

For the purpose of procuring and maintaining credit from time to time in any form whatsoever, for claims and demands against the undersigned, the undersigned submits the following as being a true and accurate statement of his financial condition on the following date, and agree that if any change occurs that materially reduces the means or ability of the undersigned to pay all claims or demands against him, the undersigned will immediately and without delay notify debtors, and unless the debtor is so notified it may continue to rely upon the statement herein given as a true and accurate statement of the financial condition of the undersigned.

ASSETS			LIABILITIES		
Cash on Hand and in Banks			Notes Payable to Banks (secured)		
Listed Securities			Notes Payable to Banks (unsecured)		
Unlisted Securities			Notes Payable to Others		
Accts/Notes Receivable due from Relatives & Friends			Accounts and Bills Due		
Accts/Notes Receivable			Unpaid Income Tax		
Real Estate Owned			Other Unpaid Taxes and Interest		
Real Estate Mortgages Receivable			Real Estate Mortg & Other Liens		
Automobiles and other Personal Property			Chattel Mortgages & Other Liens Payable		
Cash Value - Life Insurance			Other Debts (Itemize)		
Other Assets (Itemize)					
			<b>TOTAL LIABILITIES</b>		
			<b>NET WORTH</b>		
<b>TOTAL ASSETS</b>			<b>TOTAL LIABILITIES &amp; NET WORTH</b>		
SOURCES OF INCOME			PERSONAL INFORMATION		
Salary	\$		Business or Occupation --		
Bonus and Commissions	\$		Age --		
Dividends	\$		Partner or officer in any other venture --		
Real Estate Income	\$				
Other Income	\$		Married	Children	
Real Estate	\$		Single	Dependents	
<b>Total</b>	<b>\$</b>				
CONTINGENT LIABILITIES			GENERAL INFORMATION		
As endorser, comaker or guarantor (business)	\$		Are any assets pledged?		
On leases or contract - autos	\$		Are you defendant in any suit		
Legal claims	\$		Personal Bank Account(s) carried at:		
Provisions for Federal Income Taxes	\$		Have you ever taken bankruptcy?		
Other special debt	\$		If yes, explain:		

NAME: \_\_\_\_\_

<b>SCHEDULE OF US GOVERNMENTS, STOCKS AND BONDS OWNED</b>						
# of shares or face value bonds	Cost	Description	In name of	Market Value		
<b>STOCKS HELD IN IRA ACCOUNTS</b>						
<b>SCHEDULE OF REAL ESTATE OWNED</b>						
Description of Property and Improvements	Date Acquired	Title in Name of	Cost	Market Value	Mortgage	
					Amount	Maturity
<b>INSURANCES HELD</b>						
Amount	Name of Company	Beneficiary	Cash Value	Loans		
<b>SCHEDULE OF ASSETS PLEDGED</b>						
Description	Value	To Whom Pledged				
<b>GIVE NAMES OF BANKS OR FINANCE COMPANIES WHERE CREDIT HAS BEEN OBTAINED</b>						
Name	Date	High Credit	Basis			

The undersigned certifies that both sides hereof and the information inserted therein has been carefully read and is true and correct.

Signature \_\_\_\_\_ Date \_\_\_\_\_