

**PERSONAL FINANCIAL STATEMENT**

Name: \_\_\_\_\_ Age: \_\_\_\_\_ SSN: \_\_\_\_\_  
 Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Phone: ( ) \_\_\_\_\_ Marital Status: \_\_\_\_\_ # of dependents: \_\_\_\_\_  
 Years at this Address: \_\_\_\_\_ Previous Address if less than 5 years: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Employer: \_\_\_\_\_  
 Emp. City: \_\_\_\_\_ State: \_\_\_\_\_ Phone: ( ) \_\_\_\_\_  
 Spouse Name: \_\_\_\_\_ Age: \_\_\_\_\_ SSN: \_\_\_\_\_  
 Spouse Employer: \_\_\_\_\_ Emp City: \_\_\_\_\_ State: \_\_\_\_\_ Phone: ( ) \_\_\_\_\_

FINANCIAL CONDITION AS OF \_\_\_\_ / \_\_\_\_ / \_\_\_\_

ASSETS	LIABILITIES
CASH – Checking & Savings	NOTES PAYABLE TO BANKS
-M.M. & IRA	-
STOCKS & BONDS- Schedule 1	- Credit Cards
-Listed	OTHER NOTES PAYABLE
-Unlisted	- Real Estate Loans
REAL ESTATE- Schedule 3	-
	- Auto Loans
LIFE INSURANCE- Cash Value	- Loans on Life Insurance
ACCOUNTS & NOTES RECEIVABLE	TAXES PAYABLE
-Relatives & Friends	- Unpaid Income Taxes
-Collectible	- Unpaid Real Estate Taxes
-Doubtful	OTHER DEBTS
OTHER PERSONAL PROPERTY	-
-Automobiles	-
-Artwork	
-Furnishings	TOTAL LIABILITIES
-Other	NET WORTH
TOTAL ASSETS	TOTAL LIABILITIES + NET WORTH

ANNUAL INCOME	ANNUAL EXPENDITURES
Salary, Wages, Bonus & Commission	Property Tax & Assessments
Dividend & Interest	Federal & State Income Tax
Rentals (Gross)	Real Estate Loan Payments
Other Income (alimony, child support, or maintenance need not be listed unless you wish it to be considered for granting credit.)	Payments on Contracts & Notes
	Insurance Premiums
	Estimated Living Expenses
	Other
TOTAL INCOME	TOTAL EXPENDITURES

Life Insurance	Face Amount	Beneficiary	Company

Have you ever gone through bankruptcy? <input type="checkbox"/> Yes <input type="checkbox"/> No	Have you previously borrowed from other banks? <input type="checkbox"/> Yes <input type="checkbox"/> No
Are there any suits or judgements against you? <input type="checkbox"/> Yes <input type="checkbox"/> No	Are there any pending against you? <input type="checkbox"/> Yes <input type="checkbox"/> No

**SCHEDULE 1- LISTED AND UNLISTED STOCKS AND BONDS OWNED**

No. of Shares of Par Values LISTED	DESCRIPTION	ISSUED IN NAME OF	Joint Tenancy Ten. in Common Com. Property Sep. Property	Market Value
<b>UNLISTED</b>	<b>TOTAL LISTED:</b>			
<b>TOTAL UNLISTED:</b>				

Are any of the above listed securities pledged to secure a debt?

**SCHEDULE 2- TRUST DEEDS AND MORTGAGES OWNED**

Name of Payer	Legal desc., address, & type of improvements	Unpaid Balance	Joint Tenancy Ten. in Common Com. Property Sep. Property	Terms	1 <sup>st</sup> or 2 <sup>nd</sup> lien	Value of property
<b>TOTAL:</b>						

**SCHEDULE 3- REAL ESTATE (Designate: I= Improved, U= Unimproved)**

Loc. or desc.	Title in name of	Joint Tenancy Ten. in Common Com. Property Sep. Property	COST	Present Value	Trust deeds, mortgages or other lines			
					Unpaid \$	%	Month pmnt	Held by

**SCHEDULE 4- DETAILS RELATIVE TO OTHER IMPORTANT ASSETS AND LIABILITIES**

ASSETS	LIABILITIES

The forgoing information is submitted for the purpose of obtaining credit either in my/our name, or either of us, or in the name of third persons or a corporation or other entity in whose behalf I/we or either of us, either severally or jointly with others, may execute a guaranty in your favor. I/we understand that you are relying on the information herein contained and accordingly warrant and represent said information is complete, truthful, and accurate as of the date indicated. I/we further agree to notify you immediately of any material change with regard to the foregoing information which may occur while indebted to you.

I/we understand that in signing this statement, I/we do not become obligated to you beyond the accuracy of the information set forth above except to the extent that I/we agree to become so obligated by executing a note, guaranty, or other debt instrument.

You are authorized to make all inquiries you deem necessary to verify the accuracy of the information set forth herein and to determine my/our credit worthiness. You are further authorized to answer any questions concerning your credit experience with me/us.

Applicant, Co-Applicant (Spouse) Signature(s) X _____ X _____	DATE
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