

## PERSONAL FINANCIAL STATEMENT

**IMPORTANT: Read these instructions before completing this statement**

If you are applying for individual credit in your name and are relying on your own income or assets and not the income or assets of another person as the basis for repayment of the credit requested, complete only sections 1 and 3

If you are applying for joint credit with another person, complete all sections providing information in Section 2 about joint applicant

If you are applying for individual credit, but are relying on income from alimony, child support or separate maintenance or on the income or assets of another person as a basis for repayment of the credit requested, complete all Sections, providing information on Section 2 about the person whose alimony, support or maintenance payments or income or assets you are relying on.

If this statement relates to your guaranty of other person(s), firm(s) or corporation(s), complete Sections 1 and 3.

SECTION 1 - INDIVIDUAL INFORMATION		SECTION 2 - OTHER PARTY INFORMATION	
Name:		Name:	
Home Address:		Home Address:	
City, State, Zip:		City, State, Zip:	
Home Phone:		Home Phone:	
Position or Occupation		Position or Occupation	
Business Name:		Business Name:	
Business Address:		Business Address:	
City, State, Zip:		City, State, Zip:	
Business Phone:		Business Phone:	

### SECTION 3 - PERSONAL FINANCIAL CONDITION AS OF:

ASSETS		LIABILITIES	
Cash in checking & savings accounts (Sch A)		Notes payable to banks - secured	
Cash in property accounts		Notes payable to banks - unsecured	
Value of 401K/IRAs		Due to brokers	
Marketable Securities (Sch B)		Amounts payable to others	
Non-Marketable securities (Sch C)		Real Estate mortgages payable (Sch D)	
Life insurance - Cash surrender value (Sch E)		Credit cards	
Real estate owned (Sch D)		Other debts -	
Business/Partnership/PC interests		Other debts -	
Automobiles/Boats		Other debts -	
Notes receivable			
Other assets -			
Other assets -		<b>TOTAL LIABILITIES</b>	
Other assets -		<b>NET WORTH</b>	
<b>TOTAL ASSETS</b>		<b>TOTAL LIABILITIES AND NET WORTH</b>	

SOURCES OF INCOME FOR YEAR ENDED:		PERSONAL INFORMATION			
Salary or adjusted income		Do you have a will?			
Bonus or commissions		If so, name of executor:			
Dividends and interest		Are you a partner or officer in any other venture? If so, describe:			
Net Real Estate income		Are you obligated to pay alimony, child support or separate maint. payments?			
Net Business/1099 income		If so, describe:			
Pension/SSI		Income taxes settled through (Date):			
<b>TOTAL INCOME</b>		Are you a co-defendant in any suits or legal actions? If so, describe:			
<b>ANNUAL EXPENDITURES</b>		Are any assets pledged other than as described on the attached schedules?			
Home mortgage payments		Have you ever been declared bankrupt? If so, describe:			
Property taxes		Personal bank accounts carried at:			
Property insurance					
Rent expense		Bank Name	City	State	Phone
Auto loans/Other loans					
Credit cards					
Allimony/Child support					
Tuition expense					
Other expenses					
<b>TOTAL ANNUAL EXPENDITURES</b>					

CONTINGENT LIABILITIES	YES/NO	AMOUNT
Are you a guarantor, co-maker or endorser for any debt of an individual, corp. or partnership?		
Do you have any outstanding letters of credit or surety bonds?		
Are there any suits or legal actions pending against you?		
Are you contingently liable on any lease or contract?		
<b>TOTAL CONTINGENT LIABILITIES</b>		

