

Personal Financial Statement

IMPORTANT: READ THESE DIRECTIONS 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 Section 1 and 3.
- _____ If you are applying for joint credit with another person, complete all sections providing information in Section 2 about the 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 in Section 2 about the person on whose alimony, child support or maintenance payments or income or assets you are relying.
- _____ If this statement relates to your guaranty of the indebtedness of other person(s), firm(s), or corporation(s), complete Sections 1 and 3.

(SECTION 1) INDIVIDUAL INFORMATION

Name:
Address:
City/State/Zip:
Phone:
D.O.B.:
Soc. Sec.#:
Occupation:

(SECTION 2) OTHER PARTY INFORMATION

Name:
Address:
City/State/Zip:
Phone:
D.O.B.:
Soc. Sec.#:
Occupation:

(SECTION 3) STATEMENT OF FINANCIAL CONDITION AS OF (DATE):

ASSETS

Cash, Savings, CDs on hand
Accounts Receivable
Furniture & Fixtures
(A) US Govt. Marketable Sec.
(B) Non-Marketable Sec.
(C) Real Estate
(D) Cash Value Life Insurance

TOTAL ASSETS

LIABILITIES

(E) Miscellaneous Debts
Notes Payable
Unpaid Taxes
Accounts Payable
(D) Policy Loans
(C) Real Estate Mortgages

TOTAL LIABILITIES

NET WORTH

TOTAL LIAB. & NET WORTH

INCOME FOR YEAR ENDED

Salary, Bonuses, & Comm.
Social Security
Loss Carryover
Business Income

TOTAL INCOME

CONTINGENT LIABILITIES

DO YOU HAVE ANY CONTINGENT
LIABILITIES? DESCRIBE ENDORSER
CO-MAKER, GUARANTOR?

Leases or Contracts?
Legal Claims?
Other Special Debt?
Guarantee Debt of Corp.
TOTAL CONT. LIABILITIES

SCHEDULE A - U.S. GOVERNMENT & MARKETABLE SECURITIES

No. of Shares	Description	In Name of	Price/Share	Pledged?	Mrkt. Value
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
TOTAL					_____

SCHEDULE B - NON-MARKETABLE SECURITIES

No. of Shares	Description	In Name of	Price/Share	Pledged?	Mrkt. Value
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
TOTAL					_____

SIGNATURE (INDIVIDUAL)

DATE

SIGNATURE (OTHER PARTY)

DATE

Address	Title In Name of	Date Acquired	Mrkt. Value	Maturity	Mtg. Amt.
		TOTAL			

Name of Com.	Owner of Policy	Beneficiary	Face Amt.	Policy Loans	Pledged?	Cash Value
		TOTAL				

Notes/Accts.		Current Amt.		Payments
	TOTAL			

Do you have a will? _____ If so, name of executor? _____

Are you a partner/officer in any venture? If so, describe. _____

Do you pay child support, alimony, or separate maintenance? If so, describe. _____

Income Tax settled through (DATE). _____

Are you a defendant in any lawsuit? _____

Have you ever been declared bankrupt in the last 14 years? _____

Personal bank accounts carried at: _____

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