



## PERSONAL FINANCIAL STATEMENT

- If you are applying for individual credit in your own 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 the joint application.  
By initialing here we both agree that we are applying for joint credit: \_\_\_\_\_
- 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 whose alimony, 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 corporations(s), complete Sections 1 and 3.

SECTION 1 – INDIVIDUAL INFORMATION (Type or Print)				SECTION 2 – OTHER PARTY INFORMATION (Type or Print)			
Name				Name			
Residence Address				Residence Address			
City, State & Zip				City, State & Zip			
Position or Occupation				Position or Occupation			
Business Name				Business Name			
Business Address				Business Address			
City, State & Zip				City, State & Zip			
Home Phone		Business Phone		Home Phone		Business Phone	

### SECTION 3 – STATEMENT OF FINANCIAL CONDITION AS OF / /

ASSETS (Do not include Assets of doubtful value)	In Dollars (Omit Cents)	LIABILITIES	In Dollars (Omit Cents)
Cash on Hand and in Banks	\$	Notes Payable to Banks - Secured	\$
U.S. Gov't & Marketable Securities – see Sch A	\$	Notes Payable to Banks - Unsecured	\$
Non-Marketable Securities – see Schedule B	\$	Due to Brokers	\$
Securities Held by Broker in Margin Accounts	\$	Amounts Payable to Others - Secured	\$
Restricted or Control Stocks	\$	Amounts Payable to Others - Unsecured	\$
Partial Interest in R/E Equities – see Sch C	\$	Accounts and Bills Due	\$
Real Estate Owned – see Schedule D	\$	Unpaid Income Tax	\$
Loans Receivable	\$	Other Unpaid Taxes and Interest	\$
Automobiles and Other Personal Property	\$	Real Estate Mortgages Payable – see Sch D	\$
Cash Value – Life Insurance – see Sch E	\$	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 FOR YEAR ENDED / / PERSONAL INFORMATION

	INDIVIDUAL	JOINT		
Salary, Bonuses, & Commissions	\$	\$	Do you have a will?	If Yes, name of executor:
Dividends	\$	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Real Estate Income	\$	\$	Are you a partner or officer in any other venture? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Other Income (Alimony, child support of separate maintenance income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation)			If so, describe:	
	\$	\$	Are you obligated to pay alimony, child support or separate maintenance payments? <input type="checkbox"/> Yes <input type="checkbox"/> No	
	\$	\$	If so, describe:	
<b>TOTAL</b>	\$	\$	Are any assets pledged other than as described on schedules? <input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>CONTINGENT LIABILITIES</b>			If so, describe:	
Do you have any contingent liabilities? If so, describe:			Income tax settled through (date):	
As Endorser, Co-Maker, or Guarantor?	\$	\$	Are you a defendant in any suits or legal actions? <input type="checkbox"/> Yes <input type="checkbox"/> No	
On Leases or Contracts?	\$	\$		
Legal Claims	\$	\$	Personal bank accounts carried at:	
Other Special Debt	\$	\$		
Amt of Contested Income Tax Liens	\$	\$	Have you ever been declared bankrupt? <input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>TOTAL</b>	\$	\$	If so, describe:	

(COMPLETE SCHEDULES AND SIGN ON NEXT PAGE)

(USE ADDITIONAL SCHEDULES IF NECESSARY)

**SCHEDULE A – U.S. GOVERNMENTS & MARKETABLE SECURITIES**

Number of Shares or Face Value (Bonds)	Description	In Name of	Are These Pledged?	Market Value

**SCHEDULE B – NON-MARKETABLE SECURITIES**

Number of Shares	Description	In Name of	Are These Pledged?	Source of Value	Value

**SCHEDULE C – PARTIAL INTERESTS IN REAL ESTATE EQUITIES**

Address & Type of Property	Title in Name of	% of Ownership	Date Acquired	Cost	Market Value	Mortgage Maturity	Mortgage Amount

**SCHEDULE D – REAL ESTATE OWNED**

Address & Type of Property	Title in Name of	Date Acquired	Cost	Market Value	Mortgage Maturity	Mortgage Amount

**SCHEDULE E – LIFE INSURANCE CARRIED, INCLUDING N.S.L.I. AND GROUP INSURANCE**

Name of Insurance Company	Owner of Policy	Beneficiary	Face Amount	Policy Loans	Cash Surrender Value

**SCHEDULE F – BANKS OR FINANCE COMPANIES WHERE CREDIT HAD BEEN OBTAINED**

Name & Address of Lender	Credit in the Name of	Secured or Unsecured?	Original Date	High Credit	Current Balance

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 on 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 that 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 credit-worthiness. You are authorized to answer questions about your credit experience with me/us.

Signature (Individual) \_\_\_\_\_

SSN \_\_\_\_\_ Date of Birth \_\_\_\_\_

Signature (Other Party) \_\_\_\_\_

SSN \_\_\_\_\_ Date of Birth \_\_\_\_\_

Date Signed \_\_\_\_\_