

Personal Financial Statement

CONFIDENTIAL

Personal Financial Statement as of: _____

Name: _____ Soc. Sec. #: _____ Date of Birth: _____

Married: _____ (Y/N)

Spouse: _____ Soc. Sec. #: _____ Date of Birth: _____
 (spouse, if married, please file joint statement)

Home Address: _____

Home Phone: _____ Bus. Phone: _____

Home Email: _____ Bus. Email: _____

Sources of Income	In Even Dollars	General Information	
Salary		Employer	
Bonus and Commissions		Pos/Profession	
Dividends and Interest		Employer's Address	
Real Estate Income			
*Other Income: Itemize		Employer's Phone Number	
		No. Years	
TOTAL	\$ -	Partner, officer or owner in any other venture? If yes, list.	
*Alimony, child support or separate maintenance payments need not be disclosed unless relied upon as a basis for extension of credit. If disclosed, payments received under court order, written agreement, oral understanding.		Any asset pledged in these ventures? If yes, list.	
		Income taxes settled through (date)	

Contingent Liabilities	In Even Dollars	General Information (Continued)	
As endorser, co-maker or guarantor		Are you a defendant in any suits or legal action? If yes, explain.	
On leases			
Legal claims		Have you ever declared Bankruptcy? If yes, explain.	
Provision for federal income taxes			
Other special debt (recourse or repurchase liability)		Do you have a will or a trust? If yes, with whom?	
TOTAL	\$ -	Number of dependants	Ages

Cash at hands for Banks & Savings

List here the names of all the institutions at which you maintain a deposit account for checking and saving.

Name of Institution	Names on the account	Balance	
		\$	-
		\$	-
		\$	-
TOTAL		\$	-

Credit Cards and loans from other Finance Companies

List here the names of all the institutions where you have obtained loans that are not secured by real estate including credit cards

Name of Institution	Name on Account	Credit Limit	Outstanding Balance	Monthly Payment	Secured by What Assets
TOTAL		\$	-	\$	-

Marketable Securities

Name of Institution / Issuer Name	In Name Of	Market Value	Pledged Yes/No	Amount Pledged
TOTAL		\$	-	

Real Estate Owned by Individuals (and related debt, if applicable)

List all real estates owned by the individuals only. Please don't list the real estate owned by LLC

Property Address	Title in Name of	Date Acquired	Present Mkt. Value	Real Estate Mortgage		
				Bal. Owing	Mo. Paymt.	Lienholder
TOTAL			\$	-	\$	-

Equity in LLCs, S-Corps, or Other Businesses

List all businesses owned by you. Valuation = % of ownership x your business value. For real estate business, please list the real estate owned with its current market value and debt in a separate sheets. The business value for real estate business is equal to the current market value minus the current debt.

Business Name	%ofOwnership	Basis for Valuation	Valuation	Other Owners or Members
TOTAL			\$	-

Accounts, Loans, & Notes Receivable (only if you have lent money to others or invested in other businesses)

Name of Debtor /Borrower	Age of Debt	Maturity	Original Balance			
				Bal. Owing	Mo. Paymt	Secured By
TOTAL			\$	-	\$	-

Life Insurance Carried (List your life insurance and the amount you borrow against life insurance, if a

Name of Company	Face Amount	Cash Surrender Value	Loans (if any)	Beneficiary
TOTAL	\$ -	\$ -	\$ -	

Personnel Asset & Net Worth

The table below represents your total assets and your total liabilities. Please review, add and adjust carefully.

Assets	<i>In Even Dollars</i>	<i>Liabilities and Net Worth</i>	<i>In Even Dollars</i>
Cash on hand and in Banks	\$ -	Notes Payable - Credit Cards & Other Institutions	\$ -
Marketable Securities	\$ -	Real Estate Mortgages Payable	\$ -
Real Estate Owned	\$ -	Life Insurance Loans	\$ -
Loans, Notes Receivable	\$ -	Unpaid Tax	
Cash Value of Life Insurance	\$ -		
Equity in LLC's, S-Corp's or Other Businesses	\$ -	Other Liabilities: Itemize	
Retirement Accounts (401K, Sep IRA, etc.)			
Other Assets: Itemize			
Cars & Trucks			
Motor Home			
Antique Cars			
Personal Property		TOTAL LIABILITIES	\$ -
		NET WORTH	\$ -
TOTAL ASSETS	\$ -	TOTAL LIABILITIES AND NET WORTH	\$ -

I/We have carefully read and submitted the foregoing information provided on all three pages of this statement to the financial group named above (the "Bank"). The information is presented as a true and accurate statement of my/our financial condition on the date indicated. This statement is provided for the purpose of obtaining and maintaining credit with said Bank. I/We agree that if any material change(s) occur(s) in my/our financial condition that I/we will immediately notify said Bank of said change(s) and unless said Bank is so notified it may continue to rely upon this financial statement and the said representations made herein as a true and accurate statement of my/our financial condition.

I/We authorize the Financial group named above to make whatever credit inquiries it deems necessary in connection with this financial statement. I/We authorize and instruct any person or consumer reporting agency to furnish to the Bank any information that it may have or obtain in response to such credit inquiries.

I/we also hereby certify that no payment requirements listed herein are delinquent or in default except as follows; if "NONE" so state.

I/We fully understand that it is a federal crime punishable by fine or imprisonment or both to knowingly make any false statements concerning any of the above facts, pursuant to 18 U.S.C. Section 1014.

Applicant's
Signature _____ Date Signed _____ Date of Birth _____