



Personal Financial Statement

As of _____, 20__

Complete this form for: (1) each proprietor, or (2) each limited partner who owns 20% or more interest and each general partner, or (3) each stockholder owning 20% or more of voting stock and each corporate officer and director, or (4) any other person or entity providing a guaranty on the loan.

Name _____ Home phone _____ Business phone _____

Home address _____ City _____ St. _____ Zip _____

Business name of applicant/borrower _____

Assets	OMIT CENTS	Liabilities	OMIT CENTS
Cash on hand and in banks	\$ _____	Accounts payable	\$ _____
Savings accounts	\$ _____	Notes payable to banks and others	\$ _____
IRA or other retirement accounts	\$ _____	(Describe in Section 2)	
Accounts and notes receivable	\$ _____	Installment account (Auto)	\$ _____
Life insurance-cash surrender value only	\$ _____	Monthly payments \$ _____	
(Complete Section 8)		Installment account (Other)	\$ _____
Stocks and bonds	\$ _____	Monthly payments \$ _____	
(Describe in Section 3)		Loan on life insurance	\$ _____
Real estate	\$ _____	Mortgages on real estate	\$ _____
(Describe in Section 4)		(Describe in Section 4)	
Automobile-present value	\$ _____	Unpaid taxes	\$ _____
Other personal property	\$ _____	(Describe in Section 6)	
(Describe in Section 5)		Total liabilities	\$ _____
Other assets	\$ _____	Net worth	\$ _____
(Describe in Section 5)			
Total	\$ _____	Total	\$ _____

Section 1.	Source of Income	Contingent Liabilities	
Salary	\$ _____	As endorser or co-maker	\$ _____
Net investment income	\$ _____	Legal claims & judgments	\$ _____
Real estate income	\$ _____	Provision for federal income tax	\$ _____
Other income (Describe below)*	\$ _____	Other special debt	\$ _____

Description of Other Income in Section 1.

*Alimony or child support payments need not be disclosed in "Other Income" unless it is desired to have such payments counted toward total income.

Section 2. Notes Payable to Banks and Others	Use attachments if necessary. Each attachment must be identified as a part of this statement and signed.				
Name and address of noteholders	Original Balance	Current Balance	Payment Amount	Frequency (Monthly, etc)	How secured or endorsed Type of collateral

Section 3. Stock and Bonds		Use attachments if necessary. Each attachment must be identified as a part of this statement and signed.			
Number of shares	Name of Securities	Cost	Market value Quotation/Exchange	Date of Quotation/Exchange	Total Value

Section 4. Real Estate Owned	List each parcel separately. Use attachments if necessary. Each attachment must be identified as a part of this statement and signed.		
	Property A	Property B	Property C
Type of property			
Owner			
Property address			
Date Purchased			
Original cost			
Present market Value			
Mortgage holder			
Address of mortgage holder			
Mortgage account number			
Mortgage balance			
Amount of payment per month/year			
Status of mortgage			

Section 5. Other personal property and other assets.	Describe, and if any is pledged as security, state name and address of lien holder, amount of lien, terms of payment, and if delinquent, describe delinquency.

Section 6. Unpaid Taxes	Describe in detail, as to type. To whom payable, when due amount and to what property, if any, a tax lien attaches.

Section 7. Other Liabilities	Describe in detail.

Section 8. Life Insurance Held	Give face amount and cash surrender value of policies- Name of insurance company and beneficiaries.

Lender is authorized to make all inquiries deemed necessary to verify the accuracy of the statements made herein and to determine my/ our creditworthiness. (I) or (We) certify the above and the statements contained in the schedules herein are a true and accurate statement of (my) or (our) financial condition as of the date stated herein.

Signature	Date	Social Security Number
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Signature	Date	Social Security Number
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