

PERSONAL FINANCIAL STATEMENT

PERSONAL INFORMATION

Name: _____ Date Completed: _____
 Residence Address: _____ City, State, Zip: _____

ASSETS	Value	LIABILITIES	Value
Cash on Hand & In Bank	_____	Notes Due to Banks	_____
Cash Value of Life Insurance	_____	Notes Due to Relatives & Friends	_____
Government Securities	_____	Notes Due to Others	_____
Other Marketable Securities	_____	Account & Bills Payable	_____
Notes & Account Receivable (Good)	_____	Unpaid Income Taxes (Federal State)	_____
Other Assets Readily Convertible:		Other Unpaid taxes & Interest	_____
a) _____	_____	Loan on Life Insurance Policies	_____
b) _____	_____	Contract Account Payable	_____
c) _____	_____	Cash Rent Owed	_____
Total Current Assets		Other Liabilities Due within 1 year	
Real Estate Owned	_____	a) _____	_____
Mortgages & Contracts Owned	_____	b) _____	_____
Notes Accounts Receivable (Doubtful)	_____	Total Current Liabilities	
Notes Due From Relatives & Friends	_____	Real Estate Mortgage Payable	_____
Other Securities (Not Marketable)	_____	Liens & Assessments Payable	_____
Personal Property	_____	Other Debts:	
Other Assets:		a) _____	_____
a) _____	_____	b) _____	_____
b) _____	_____	c) _____	_____
c) _____	_____	Total Liabilities	_____
d) _____	_____	Net Worth	_____
Total Assets	_____	Total Liabilities & Net Worth	_____

ANNUAL INCOME	ESTIMATED ANNUAL EXPENSES
Salary, Bonuses & Commissions	Income Taxes
Dividends & Interest	Other Taxes
Rental & Lease Income (Net)	Insurance Premiums
Other Income	Mortgage Payments
a) _____	Rent Payable
b) _____	Other Expenses
d) _____	a) _____
e) _____	b) _____
Total Annual Income	Total Estimated Annual Expenses

If married, please include your spouse's name & info and have them sign and date below.

GENERAL INFORMATION

Are any Assets Pledged?

CONTINGENT LIABILITIES

As Endorses, Co-maker or Guarantor _____

On Leases or Contracts _____

Legal Claims _____

Federal (State Income Taxes) _____

Other _____

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 in 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 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 creditworthiness. You are authorized to answer questions about your credit experience with me/us.

Signature (Individual): _____

Print Name: _____

Date Signed: _____

Spouse's Signature (Individual): _____

Spouse's Print Name: _____

Date Signed: _____