

### PERSONAL FINANCIAL STATEMENT

This personal financial statement is designed for those seeking commercial loans, either as a direct loan or as a guarantor. Only disclose alimony or child support income if you are relying on them as a basis for repayment of the credit requested. If you are applying for this credit solely in your own name, Lender will disregard the joint assets, but will consider all your debt and liabilities in its underwriting process.

If this is an application for joint credit, Applicant and Co-Applicant each agree that we intend to apply for joint credit (sign below):

\_\_\_\_\_  
**Applicant** (Signature)

\_\_\_\_\_  
**Co-Applicant** (Signature)

Applicant			Co-Applicant		
Name			Name		
Address			Address		
City, State, Zip			City, State, Zip		
Date of Birth	Social Security Number	Home	Date of Birth	Social Security Number	Home
Email Address			Email Address		
Employer	Position/Occupation	Business Phone	Employer	Position/Occupation	Business Phone
Business Address			Business Address		
City, State, Zip			City, State, Zip		
Length at present address	Length of employment		Length at present address	Length of employment	
Marital Status			Dependents		
<input type="checkbox"/> Married	<input type="checkbox"/> Separated		Number		
<input type="checkbox"/> Unmarried ( includes Single, Widowed, Divorced)			Ages		

Applicant Initials \_\_\_\_\_

Co-Applicant Initials \_\_\_\_\_

ANUAL INCOME YEAR ENDING <span style="border: 1px solid black; display: inline-block; width: 100px; height: 15px; vertical-align: middle;"></span>							
Anual Income	Aplicant	Co-Aplicant	Total	Anual Expenditures	Aplicant	Co-Aplicant	Total
Salary, Bonuses & Comission				Mortgage/Rental Payments			
Dividend & Interest				Real Estate Taxes & Asesment			
Rental Income				Taxes-Federal, State & Local			
Other Income				Insurance Payments			
Alimony, Child Suport				Alimony, Child Suport			
				Other Contract Payments			
<b>TOTAL INCOME</b>	-	-	-	<b>TOTAL EXPENDITURES</b>	-	-	-

If additional space is needed, please use separate sheet

STATEMENT OF FINANCIAL CONDITION							
ASSETS	Aplicant	Co-Aplicant	Total	LIABILITIES	Aplicant	Co-Aplicant	Total
Cash & Money on Deposit				Notes Payable			
Market Balance Stocks/Bonds				Margin Accounts			
Accounts & Notes Receivable							
Cash Value Life Insurance							
Pension Funds				Unpaid Taxes			
Real Estate Owned (Personal)				Life Insurance Loans			
Real Estate Owned (Investment)				Real Estate Mtg. (Personal)			
Vehicles Owned				Car Loans			
Other Personal Property				Other Debts			
Other Assets				Total Liabilities			
				Net Worth			
<b>TOTAL INCOME</b>	-	-	-	<b>Total Liabilities and Net Worth</b>	-	-	-

Applicant Initials \_\_\_\_\_  
 Co-Aplicant Initials \_\_\_\_\_

**SCHEDULE OF CASH ACCOUNTS**

Schedule A

*Cash - Checking - Savings - Money Market - CD's*

Name of Depository	Account Type	Account Number	Name on Account	Approximate Balance		Pledged	
						YES	NO
<b>TOTAL:</b>				-			

**SCHEDULE OF STOCKS & BONDS**

Schedule B

Number Shares	Stock Name & Description	Traded On Exchange	Name on Stock Certificates	Market Value		Pledged	
						YES	NO
<b>TOTAL:</b>				-			

**SCHEDULE OF ACCOUNTS & NOTES RECEIVABLE**

Schedule C

Description	Owned By	Due Date	Amount Due		Good/Doubtful	
					G	D
<b>TOTAL:</b>				-		

**SCHEDULE OF LIFE INSURANCES**

Schedule D

Name of Insurance Company	Type Policy	Benefit Value	Beneficiary	Cash Value
<b>TOTAL:</b>				

Applicant Initials \_\_\_\_\_  
Co-Applicant Initials \_\_\_\_\_

**VESTED INTEREST IN DEFERED COMPENSATION OR PENSION PLANS**

**Schedule E**

Name of Company	Amount	Date Available	Payout Basis	Beneficiary
<b>TOTAL:</b>	-			

**REAL ESTATE OWNED (Personal)**

**Schedule F**

Address	% Owned	Purchase Price	Market Value	Mortgage Balance	Date Purchased	Mon Mortgage Payment	Lender	% Rate
<b>TOTALS:</b>		-	-	-		-		

**SCHEDULE OF NOTES-PAYABLE (INSTALMENT LOANS, PERS LOANS, CREDIT CARDS)**

**Schedule H**

Owed To	Type Debt	Date Opened	Amount Owed	Monthly Pament	Secured	
					Y	N
<b>TOTAL:</b>				-	-	

**ADDITIONAL INFORMATION**

	Applicant		Secured	
	Yes	No	Yes	No
<b>Tax Returns Filed To Date:</b>				
Have either of you or any firm in which you were a major owner ever declared bankruptcy in the past 7 years or settled any debt for less than the amounts owed? If yes, please provide details on a separate sheet.				
Are (either of) you a defendant in any suit or legal action?				
Are (either of) you presently subject to any unsatisfied judgments to tax lien?				
Are you a Citizen of the United States?				
Have ou filed for Bankruptcy in the past 10 ears?				
<b>DO ANY OF THE FOLLOWING APPLY?</b>				
Contingent liabilities (as endorser, co-maker, or guarantor on an other note)?				
Contingent liabilities On leases? On contracts?				
Are you presently delinquent or in default on any Federal debt or any other loan, mortgage, financial obligation, bond, or loan guarantee?				
Contested income tax liens?				
Other special debt or circumstances?				

Applicant Initials \_\_\_\_\_  
Co-Applicant Initials \_\_\_\_\_

This financial statement, and any schedule, explanations or additional information attached is submitted to the lender on behalf of the undersigned for the purpose of procuring, establishing and maintaining credit to the undersigned or to others upon the guarante of the undersigned. The undersigned has carefully read the information contained herein and warants it to be complete, true and corect as of the folowing date and that the Lender may continue to rely upon this statement as continuing to be true and corect until a writen notice of change is given to Lender by the undersigned. If any of the information contained herein proves to be materialy incorrect or inaccurate, the Lender may declare the debt obtained by me (us) or by whom I (we) guaranted to be imediately due and payable.

Further, the undersigned agrees that this statement shall remain the property of the Lender whether or not credit is extended. The Lender is authorized to make any inquiries demed necessary to verify the acuracy of the information herein including, but not limited to: procuring consumer reports from consumer reporting agencies, obtaining credit information from other financial institutions and extenders of credit, present and past employers, and references. Further, the lender is authorized to respond to questions about your credit experience with the undersigned.

\_\_\_\_\_

Applicants Name (Print Name)

Date

\_\_\_\_\_

Co-Applicants Name (Print Name)

Date

X  
\_\_\_\_\_

Applicants Signature

X  
\_\_\_\_\_

Applicants Signature