

## Personal Financial Statement

APPLICANT INFORMATION			
Name		Other names under which credit was granted: How long at this address? Rent ___ or Own ___	
Home address			
City, State, Zip			
Home telephone			
Please indicate your marital status: ___ Married ___ Unmarried (includes single, divorced and widowed)			
Number of dependents? ___ Are you a U.S. citizen? ___ If no, which country? _____			
SPOUSE'S INFORMATION			
Name		Other names under which credit was granted: How long employed here? _____ Business Phone	
Position or Occupation			
Business name			
Business address			
City, State, Zip			
STATEMENT OF FINANCIAL CONDITION AS OF:		Date:	
Assets:	Total:	Liabilities:	Total:
Cash on hand Sch. A		Accounts payable	
Accounts/Notes receivable – Sch. B		Contracts/Notes payable – Schedule F	
Life insurance cash value (do not deduct loans) - Schedule C		Credit cards payable	
Vested pensions, IRAs, etc.		Loan(s) against life insurance – Schedule C	
Securities – Sch. D		Line of credit payable	
Other stocks and bonds - Schedule D		Taxes accrued but unpaid	
Real estate at market value – Schedule E		Real Estate loans payable – Schedule E	
Automobiles owned/financed		Other liabilities – itemize	
Other personal property			
Private companies			
Other assets - itemize		<b>Total Liabilities</b>	
		<b>Net Worth</b>	
<b>Total Assets</b>		<b>Total Liabilities &amp; Net Worth</b>	
ANNUAL INCOME		Applicant:	Spouse:
Salary			Do you have a will? If so, name of executor.
Bonus & commissions			Are you a partner or officer in any other venture? If yes, describe.
Interest/dividends			
Real estate income			Are you obligated to pay alimony, child support or separate maintenance payments? If yes, describe.
Other income			Are any assets pledged other than as described on schedules? If yes, describe.
Total	\$		Any unsatisfied judgments or decrees entered against you?
CONTINGENT LIABILITIES			
Do you have any contingent liabilities? If so, describe.			Have any legal actions or suits been filed against you?

As endorser, co-maker or guarantor?	Have you or any of your companies ever filed for bankruptcy? If yes, describe.
On leases or contracts	Have you ever made an assignment for the benefit of creditors?
Other debts?	Contested income tax liens?

**SUPPLEMENTARY SCHEDULES (Attach additional pages if necessary)**  
**SCHEDULE A — CASH ON HAND**

Bank name	Branch	Account type	Account number	Balance

**SCHEDULE B -- ACCOUNTS/NOTES PAYABLE**

Debtor	Maturity date	Amount owed	Repayment terms	Description or nature of debt

**SCHEDULE C — LIFE INSURANCE**

Name of insured	Beneficiary	Insurance co.	Face amount of policy	Surrender value	Loans out

**SCHEDULE D -- STOCKS, BONDS, SECURITIES**

Name/description	No. of shares, \$ amount, or % of company owned	Exchange listing	Market price/share	Total market value	Listed or unlisted

**SCHEDULE E — REAL ESTATE**

Description or address/city/state	Original cost	Date acquired	Market value	Unpaid balance	Monthly payment

**SCHEDULE F -- CONTRACTS/NOTES PAYABLE**

Lender	Maturity date	Amount owed	Repayment terms	Description or nature of debt

**OTHER CREDIT REFERENCES (Give names of banks, finance companies or other concerns where credit has been obtained)**

Name and address	Date	Account no.	Type of account	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 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 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 statement made herein, and to determine my/our creditworthiness, including the authorization to obtain a consumer credit report. You are authorized to answer questions about your credit experience with me/us.

**Date signed** **Date signed**

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**Signature (applicant)**

**Signature (spouse)**

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**Print name**

**Print name**

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**Social Security No.**

**Social Security No.**

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**Date of birth**

**Date of birth**

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**Driver's license no.**

**Driver's license no.**

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**E-mail**

**E-mail**

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