

# Personal Financial Statement

<b>SECTION 1 - INDIVIDUAL INFORMATION</b> (Type or Print)		Social Security No.
Name		Age
Residence Address - City, State & Zip Code		Years at Address
Telephone		<b>MARITAL STATUS</b>
Previous address if at above address less than 5 years		<input type="checkbox"/> Unmarried <input type="checkbox"/> Married
Address - City, State & Zip Code		<input type="checkbox"/> Separated
Employer		<b>DEPENDENTS</b>
Address - City, State & Zip Code		Number
Telephone Number		Ages

<b>SECTION 2 - SPOUSE'S INFORMATION</b> (Type or Print)		Social Security No.
Spouse's Name		Age
Spouse's Employer		Telephone & Ext.
Address - City, State & Zip Code		

**SECTION 3 - FINANCIAL CONDITION AS OF \_\_\_\_\_, 19\_\_\_\_**

ASSETS		IN DOLLARS	LIABILITIES		AMOUNT
	OFFICE NAME & NO.	(OMIT CENTS)		OFFICE NAME & NO.	(OMIT CENTS)
<b>CASH</b>			<b>NOTES PAYABLE TO BANKS</b>		
				Other (Itemize, Schedule 4)	
<b>STOCKS AND BONDS</b>	Listed (Schedule 1)		<b>OTHER NOTES AND ACCOUNTS PAYABLE</b>	Real Estate Loans (Schedule 3)	
	Unlisted (Schedule 1)			Sales Contracts & Chattel Mtgs. (Sch. 4)	
<b>NOTES RECEIVABLE (COLLECTIBLE)</b>	Relatives and Friends (Schedule 4)			Loans on Life Insur. Policies (Schedule 4)	
	Trust Deeds and Mortgages (Schedule 2)				
<b>REAL ESTATE</b>	Improved (Schedule 3)		<b>TAXES PAYABLE</b>	Current Year's Income Taxes Unpaid	
	Unimproved (Schedule 3)			Prior Year's Income Taxes Unpaid	
	Leasehold Interest Owned			Real Estate Taxes Unpaid	
<b>LIFE INSURANCE</b>	Cash Surrender Value		<b>OTHER LIABILITIES</b>	Unpaid Interest	
<b>OTHER PERSONAL PROPERTY</b>	Automobile			Others (Attach Details)	
	Other (Schedule 4)				
<b>TOTAL</b>			<b>TOTALS</b>	<b>TOTAL LIABILITIES</b>	
				<b>NET WORTH</b>	
				<b>TOTAL</b>	

ANNUAL INCOME		(REFER TO FEDERAL INCOME TAX RETURNS FOR PREVIOUS YEAR)	ANNUAL EXPENDITURES		(REFER TO FEDERAL INCOME TAX RETURNS FOR PREVIOUS YEAR)
		(OMIT CENTS)			(OMIT CENTS)
Salary, Bonuses and Commissions			Property Taxes and Assessments		
Dividends and Interest			Federal and State Income Taxes		
Rentals (Gross)			Real Estate Loan Payments		
<b>OTHER INCOME</b> (You do not have to list income from alimony, child support or maintenance unless you want the bank to consider it for the purpose of this application for credit.)			Payments on Contracts and Other Notes		
			Insurance Premiums		
			Estimated Living Expenses		
			Other		
<b>TOTAL INCOME</b>			<b>TOTAL EXPENDITURES</b>		

<b>LIFE INSURANCE</b>	FACE AMOUNT	BENEFICIARY		COMPANY

<b>WILL</b>	HAVE YOU PREPARED YOUR WILL? <input type="checkbox"/> YES <input type="checkbox"/> NO
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PLEASE COMPLETE THE SCHEDULES ON THE REVERSE SIDE

Are you a Guarantor, Co-maker or Endorser on anyone's debt?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Do you have any other business connection?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Have you ever gone through bankruptcy?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Have you previously borrowed from other banks?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are there any suits or judgements against you?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Any pending?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are any of your assets pledged or in any other manner unavailable for payment of your debt?	<input type="checkbox"/> Yes <input type="checkbox"/> No	If the answer is yes to any of the above questions explain on a separate sheet, attach, date, and sign the explanation.	

**SCHEDULE 1 - LISTED AND UNLISTED STOCKS AND BONDS OWNED**

NO. OF SHARES OR PAR VALUE LISTED	DESCRIPTION	ISSUED IN NAME OF	JOINT TENANCY TEN. IN COMMON COM. PROPERTY SEP. PROPERTY	MARKET VALUE
<b>UNLISTED</b>			<b>TOTAL LISTED</b>	
			<b>TOTAL UNLISTED</b>	

Are any of the above listed securities pledged to secure a debt?

**SCHEDULE 2 - TRUST DEEDS AND MORTGAGES OWNED**

NAME OF PAYER	Legal Desc., Str. Address & Type of Improvements	Unpaid Bal.	JOINT TENANCY TEN. IN COMMON COM. PROPERTY SEP. PROPERTY	Terms	1ST OR 2ND LIEN	Value of Property
<b>TOTAL</b>						

**SCHEDULE 3 - REAL ESTATE (Designate: I=Improved, U=Unimproved)**

LOCATION OR DESCRIPTION	TITLE IN NAME OF	JOINT TENANCY TEN. IN COMMON COM. PROPERTY SEP. PROPERTY	COST	PRESENT VALUE	TRUST DEEDS, MORTGAGES OR OTHER LINES			
					Unpaid Bal.	Rate %	MONTHLY PAYMENTS	HELD BY
<b>TOTAL</b>								

**SCHEDULE 4 - DETAILS RELATIVE TO OTHER IMPORTANT ASSETS AND LIABILITIES**

ASSETS	LIABILITIES

The foregoing information is submitted for the purpose of obtaining credit either in my/our name, or either of us, or in the name of third persons or a corporation or other entity in whose behalf I/we or either of us, either severally or jointly with others, may execute a guaranty in your favor. I/we understand that you are relying on the information herein contained and accordingly warrant and represent said information is complete, truthful, and accurate as of the date indicated. I/we further agree to notify you immediately of any material change with regard to the foregoing information which may occur while indebted to you.

I/we understand that in signing this statement, I/we do not become obligated to you beyond the accuracy of the information set forth above except to the extent that I/we agree to become so obligated by executing a note, guaranty, or other debt instrument.

You are authorized to make all inquires you deem necessary to verify the accuracy of the information set forth herein and to determine my/our credit-worthiness. You are further authorized to answer any questions concerning your credit experience with me/us.

SIGNATURE(S)	DATE
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