PERSONAL FINANCIAL STATEMENT

(✓ Appropriate Line) **IMPORTANT: Read these directions before completing this Statement.**

- ☐ If you are applying for individual credit in your own name and are relying on your own Income or assets and not the Income or assets of another person as the basis for repayment of the credit requested, complete only Section 1 and 3.
- ☐ If you are applying for joint credit with another person, complete all Sections providing information in Section 2 about the joint applicant.
- ☐ If you are applying for individual credit, but are relying on Income from alimony, child support, or separate maintenance or on the Income of assets of another person as a basis for repayment of the credit requested, complete all Sections providing information in Section 2 about the person whose alimony, support or maintenance payments or Income or assets you are relying.
- ☐ If this statement relates to your guaranty of the Indebtedness of other person(s), firm(s) or corporation(s), complete Sections 1 and 3.

SECTION 1 - INDIVIDUAL INFORMATION (Type or Print)	
Name	
Residence Address	
City, State & Zip	
Res. Phone	
Position or Occupation	
Business Name	
Business Address	
Business Phone	
S.S. No.	
Date of Birth	

SECTION 2 - OTHER PARTY INFORMATION (Type or Print)	
Name	
Residence Address	
City, State & Zip	
Res. Phone	
Position or Occupation	
Business Name	
Business Address	
Business Phone	
S.S. No.	
Date of Birth	

SECTION 3 - STATEMENT OF FINANCIAL CONDITION AS OF:

ASSETS (DO NOT INCLUDE ASSETS OF DOUBTFUL VALUE)	In Dollars
Cash on hand and in banks - see Schedule A	
Accounts / Notes Receivable - see Schedule D	
U.S. Government Securities - see Schedule B	
Stocks & Bonds - see Schedule B	
Real Estate Owned - see Schedule C	
Automobiles	
Cash value - life insurance - see Schedule E	
Other Assets- itemize	
TOTAL ASSETS	

LIABILITIES	In Dollars
Notes payable to banks - secured see Sch. A	
Notes payable to banks - unsecured see Sch. A	
Due to brokers	
Notes payable to others	
Real estate mortgages payable - see Sch. C	
Unpaid taxes	
Loans against cash value life insurance - see Sch. E	
Accounts Payable	
Other debts - itemize	
TOTAL LIABILITIES	
NET WORTH	
TOTAL LIAB. AND NET WORTH	

SOURCES OF INCOME FOR YEAR ENDED:	
Salary	
Bonuses & Commissions	
Dividends	
Real estate income	
Alimony, child support, or separate maintenance Income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation.	
TOTAL	

CONTINGENT LIABILITIES

Do you have any contingent liabilities? If so, describe.

	Amount of Liability
An endorser, co- maker or guarantor	
On leases or contracts	
Legal claims	
Other special debt	
Amount of contested income tax liens	

PERSONAL INFORMATION

Do you have a will? If so, name of executor.

Are you a partner in any other venture? If so, describe.

Are you obligated to pay alimony child support or separate maintenance payments? If so, describe.

Are any assets pledged other than as described on schedules? If so, describe.

Income tax settled through (date)

Are you a defendant in any suits or legal actions?

Have you ever been declared bankrupt? If so, describe.

PLEASE COMPLETE SCHEDULES ON REVERSE SIDE

SCHEDULE A - BANKS AND OTHER FINANCIAL INSTITUTIONS WHERE CREDIT HAS BEEN OBTAINED OR DEPOSITS MAINTAINED

Name of Financial Institution	Cash Deposit Balances	Loan / Line Balance	Original Date	Loan Terms / Credit Line Limit	Monthly Payment	Secured By

SCHEDULE B - STOCKS, BONDS AND U.S. GOVERNMENT SECURITIES

# of Shares or Face Value (Bonds)	Description Of Security	Registered In Name Of	Pledged (Y/N)	Listed, Unlisted, Gov't Sec.	Market Value

SCHEDULE C - REAL ESTATE OWNED

Address & Type Of Property	Title in Name of	% of Ownership	Date Acquired	Cost	Market Value	Monthly Payment	Payable To Whom	Mortgage Balance

SCHEDULE D - ACCOUNTS, LOANS AND NOTES RECEIVABLE

Name and Address of Debtor	Amount Owing	Maturity Date	Description	Repayment Terms

SCHEDULE E - LIFE INSURANCE CARRIED

Name of Insurance Company	Owner of Policy	Beneficiary	Face Amount	Type Of Policy	Loans Against Policy	Cash Surrender Value (If Any)

_____ (initial) We intend to apply jointly for credit.
Applicant

_____ (initial) We intend to apply jointly for credit.
Co-Applicant

Signature (Individual) _____ Date _____

Signature (Other Party) _____ Date _____