

Personal Financial Statement

Name of Applicant: _____ **SSN:** _____
Residential Address: _____ **No. of Yrs:** _____
City: _____ **County:** _____ **State:** _____ **Zip:** _____
Previous Address: _____ **No. of Yrs:** _____
City: _____ **County:** _____ **State:** _____ **Zip:** _____
Date of Birth: ___/___/___ **Home Ph: ()** _____ **Work Ph: ()** _____
Employer or Occupation: _____ **No. of Yrs:** _____
Spouse's Name: _____ **SSN:** _____
Nearest Living Relative: _____ **Address:** _____ **Relationship:** _____

ASSETS

LIABILITIES

Cash in Bank	Notes Payable to Bank
Cash on Hand	Notes Payable to Others
US Gov't Securities - Schedule I	Notes Payable to Relatives
Stocks and Bonds - Schedule I	Accounts & Bills Payable - Sch. VI
Accts. & Notes Rec. - from Relatives & Friends Sch. II	Accrued Taxes, etc.
Accts. & Notes Rec. - from Others - Sch. II	Chattel Mortgages or Liens Payable - Sch. IV
Real Estate Mortgages & Contracts Owed - Sch. III	Mortgages or Liens on Real Estate - Sch. IV
Real Estate Owned - Sch. IV	Loans on Life Insurance Policies - Sch. V
Automobile(s)	Other Debts - Itemize - Sch. VI
Personal Property	Income Tax Payable
Cash Value Inheritance - Sch. V	
Other Assets - Itemize	TOTAL LIABILITIES
	Net Worth (Assets minus Liabilities)
TOTAL ASSETS	TOTAL LIABILITIES & NET WORTH

SOURCE OF INCOME

CONTINGENT LIABILITIES

Salary: <input type="checkbox"/> Monthly <input type="checkbox"/> Annual	As Endorser or Co-Maker
Bonus/Commissions: <input type="checkbox"/> Monthly <input type="checkbox"/> Annual	On Leases or Contract
Dividends	Provision for Federal Income Taxes
Real Estate Income	Other Special Debt
Other Income - Itemize	
TOTAL	

Have you ever had a Bankruptcy?
 Yes (If yes, please attach explanation) No

Are you a defendant in any suits or legal actions?
 Yes (If yes, please attach explanation) No

Personal Bank Account carried at? _____
 Branch: _____ Ph: () _____
 Bank Account No: _____

Please list all contingent liabilities on the reverse side.

For the purpose of procuring & maintaining credit, the undersigned submits the foregoing & following statement & information contained on both sides of this sheet both written & printed & including supplemental statements as being a full, true & correct statement of my financial condition on the date stated. The undersigned agrees to notify Lessor immediately in writing of any materially unfavorable change in his financial condition, and in the absence of such notice, or a new and full written statement, this may be considered as a continuing statement and substantially correct.

Applicant's Signature: _____ Date: _____

SCHEDULE I

STOCKS and BONDS

No. Shares or par value	Description	Value per Share	Total Mkt Value	No. Shares or par value	Description	Value per Share	Total Mkt. Value

SCHEDULE II

ACCOUNTS AND NOTES RECEIVABLE

Due From	Monthly Income	Original Balance	Present Balance	Collateral	Comments

SCHEDULE III

CONTRACTS OR MORTGAGES OWNED

Location (Type of Property)	Monthly Income	Original Balance	Present Balance	Amount Owed	Monthly Payment	Owed To

SCHEDULE IV

REAL ESTATE OWNED

Legal Description or Address	Cost	Market Value	Mortgage Lien	Monthly Payment	Monthly Payment	Mortgage Holder	Monthly Income

SCHEDULE V

LIFE INSURANCE POLICIES

Name of Insured	Life Insurance Company	Amount of Policy	Cash Value	Loans Against Policy	Beneficiary

SCHEDULE VI

ACCOUNTS, BILLS & OTHER DEBTS PAYABLES

Payable To	Collateral	Payments	Balance	Payable to	Collateral	Payment	Balance

Have you established a Trust Account: _____ Who is named as Trustee? _____

Have you made a will? _____ Who is named as Executor? _____

List all contingent liabilities, including guaranties, endorsements, claims, suits.

IMPORTANT: Submit on an attached sheet any explanation necessary for a clear understanding of the foregoing statement, particularly if you are contingently labeled as an endorser, guarantor, or co-maker; or if there are unsatisfied legal claims against you; or if you are a partner or officer in any other venture; and if any assets listed on this statement are not community property or held in joint tenancy.