

# PERSONAL FINANCIAL STATEMENT

**IMPORTANT: Read these direction 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 Sections 1 & 3.
- If you are applying for joint credit with another person, complete all Sections providing information in section 2 above the joint application.
- If you are applying for individual credit, but are relying on income from alimony, child support, or separate maintenance or on the income or assets of another person as a basis for repayment of the credit requested, complete all Sections, providing information in Section 3 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)	SECTION 2 - OTHER PARTY INFORMATION (Type or Print)
Name	Name
Residence Address	Residence Address/Time at This Address
City, State & Zip	City, State & Zip
Position or Occupation	Position or Occupation/Length of Employment
Business Name	Business Name
Business Address	Business Address
City, State & Zip	City, State & Zip
Res. Phone                      Bus. Phone	Res. Phone                      Bus. Phone

SECTION 3 - STATEMENT OF FINANCIAL CONDITION AS OF _____, 19					
ASSETS (Do not include Assets of doubtful value)	In Dollars (Omit cents)		LIABILITIES	In Dollars (Omit cents)	
Cash on hand and in banks			Notes payable to banks - secured		
U.S. Gov't. & Marketable securities - See Schedule A			Notes payable to banks - unsecured		
Non-Marketable Securities - see Schedule B			Due to brokers		
Securities held by broker in margin accounts			Amounts payable to others - secured		
Restricted or control stocks			Amounts payable to others - unsecured		
Partial interest in real Estate Equities - see Schedule C			Accounts and bills due		
Real Estate Owned - see Schedule D			Unpaid income tax		
Loans Receivable			Other unpaid taxes and interest		
Automobiles and other personal property			Real estate mortgages payable - see Schedule D		
Cash-value life insurance - see Schedule E			Other debts - itemize:		
Other assets - itemize:					
			<b>TOTAL LIABILITIES</b>		
			<b>NET WORTH</b>		
<b>TOTAL ASSETS</b>			<b>TOTAL LIABILITIES &amp; NET WORTH</b>		

SOURCES OF INCOME FOR YEAR ENDED _____, 20	PERSONAL INFORMATION
Salary, bonuses & commissions	Do you have a will? If so, name executor:
Dividends	
Real estate income	Are you a partner or officer in any other venture? If so, describe:
Other 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)	
Do you have any contingent liabilities? If so, describe:	Are you obligated to pay alimony, child support or separate maintenance payments? If so, describe:
As indorser, co-maker or guarantor? \$	Are any assets pledged other than as described on schedules? If so, describe:
On leases or contracts? \$	Income tax settled through (date)
Legal claims \$	Are you a defendant in any suits or legal actions?
Amount of contested income tax liens \$	Personal bank accounts carried at:
	Have you ever been declared bankrupt? If so, describe:

**(COMPLETE SCHEDULES AND SIGN BELOW)**

**SCHEDULE A - U.S. GOVERNMENTS & MARKETABLE SECURITIES**

Number of Shares or Face Value (Bonds)	Description	In Name Of	Are These Pledged?	Market Value

**SCHEDULE B - NON-MARKETABLE SECURITIES**

Number of Shares	Description	In Name Of	Are These Pledged?	Source of Value	Value

**SCHEDULE C - PARTIAL INTERESTS IN REAL ESTATE EQUITIES**

Address & Type of Property	Title in Name Of	% Of Ownership	Date Acquired	Cost	Market Value	Mortgage Maturity	Mortgage Amount

**SCHEDULE D - REAL ESTATE OWNED**

Address & Type of Property	Title in Name Of	Date Acquired	Cost	Market Value	Mortgage Maturity	Mortgage Amount

**SCHEDULE E - LIFE INSURANCE CARRIED, INCLUDING N.S.L.I. AND GROUP INSURANCE**

Name of Insurance Company	Owner of Policy	Beneficiary	Face Amount	Policy Loans	Cash Surrender Value

**SCHEDULE F - BANKS OR FINANCE COMPANIES WHERE CREDIT HAS BEEN OBTAINED**

Name & Address of Lender	Credit In The Name Of	Secured or Unsecured?	Original Date	High Credit	Current 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 on behalf of 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 STATEMENTS MADE HEREIN, AND TO DETERMINE MY/OUR CREDITWORTHINESS, AND I/WE AGREE TO PAY A FEE OF \$20.00 FOR THIS RESEARCH. YOU ARE AUTHORIZED TO ANSWER QUESTIONS ABOUT YOUR CREDIT EXPERIENCE WITH ME/US.**

Signature \_\_\_\_\_ (Individual)

S.S. No. \_\_\_\_\_ Date of Birth \_\_\_\_\_

Signature \_\_\_\_\_ (Other Party)

S.S. No. (Other Party) \_\_\_\_\_ Date of Birth \_\_\_\_\_

Date Signed \_\_\_\_\_