



PERSONAL FINANCIAL STATEMENT

Financial Condition as of: _____, 20____

Complete this form for: (1) each proprietor, or (2) each partner who owns 20% or more interest, or (3) each stockholder owning 20% or more interest, or (4) any person providing a guaranty on the loan.

Applicant	Co-Applicant
Social Security No.	Social Security No.
Birth Date	Birth Date
Address	
Home Phone	Business Phone
Business Name of Applicant/Borrower	
Name, Address & phone number of nearest relative not living with applicant(s)	

Cash Accounts – Section 1	\$ _____	Accounts Payable	\$ _____
IRA / Retirement Funds	\$ _____	Notes Payable - Section 5	\$ _____
Accounts / Notes Receivable	\$ _____	Installment Loan (Auto) Mthly. Payment \$ _____	\$ _____
Cash Surrender Value of Life Insurance	\$ _____	Installment Loan (Other) Mthly. Payment \$ _____	\$ _____
Marketable Securities / Brokerage Accts – Section 2	\$ _____	Loan(s) on Life Insurance	\$ _____
Value of Closely Held Businesses	\$ _____	Real Estate Mortgages - Section 4	\$ _____
Real Estate Holdings – Section 3	\$ _____	Unpaid Taxes	\$ _____
Autos – Present Value	\$ _____	Other Liabilities	\$ _____
Personal Furnishings	\$ _____		\$ _____
Other Assets (please define)	\$ _____	Total Liabilities	\$ _____
Total Assets	\$ _____	Net Worth	\$ _____

Sources of Income	Applicant	Co-Applicant	Contingent Liabilities (if any)	
Salary	\$ _____	\$ _____	As Guarantor or Co-Maker	\$ _____
Net Invest Income	\$ _____	\$ _____	Any Legal Claims & Judgments	\$ _____
Real Estate Income	\$ _____	\$ _____	Unpaid Federal Income Taxes	\$ _____
Other Income*	\$ _____	\$ _____	Other Special Debt	\$ _____
Please Provide Description of Other Income				
*Alimony or child support payments need not be disclosed in "Other Income" unless it is desired to have such payments counted toward total income.				
Please Provide Details of Contingent Liabilities				

Section 1 – Cash Accounts			
Account Title	Financial Institution	Balance	Pledged Y/N

Section 2 – Marketable Securities / Brokerage Accounts					
# of Shares	Name of Security	Cost	Market Value Exchange	Date of Value	Total Value

Section 3 – Real Estate Holdings					
Name in which Property is Titled	Address	Homestead, Residential or Commercial	Date Acquired	Original Cost	Estimated Value
1.					
2.					
3.					
4.					

Section 4 – Real Estate Loans Payable					
Mortgage Holder	Original Mtg Amount	Current Mtg Balance	Monthly Payment	Monthly Rental Income	
1.					
2.					
3.					
4.					

Section 5 - Notes Payable				
Note Holder	Original Balance	Current Balance	Monthly Payment	Collateral

The following information is applicable to the person(s) signing this Personal Financial Statement		
	Applicant (Yes/No)	Co-Applicant (Yes/No)
1. Are you a U.S. Citizen?		
2. Are you a defendant in any suits or legal actions?		
3. Have you ever declared bankruptcy?		
4. Have any judgments ever been entered against you?		
5. Do you have ownership in or are you a partner in any other corporation or partnership?		
6. Do you pay alimony, child support, or separate maintenance payments? If yes, amount \$_____		
If you answered yes to questions 2 – 6, please provide details:		

The financial statement and the information contained herein is given to the financial institution, hereafter called "Lender", by the undersigned for the purpose of inducing Lender, from time to time, to extend credit to or otherwise become or remain the creditor of the undersigned, or persons, firms or corporations in whose behalf the undersigned may either individually or jointly with others, execute a guarantee in the Lender's favor. The undersigned acknowledges that the Lender will rely on the information contained in this Financial Statement in making its credit decision, and **under penalty of perjury**, represents and warrants that such information is true and complete and that there are no material omissions. The undersigned agrees that the Lender may consider this Financial Statement as continuing to be true and complete until a written notice of a change is given to the Lender by the undersigned. The Lender and/or its affiliates is authorized to make all inquires that it deems necessary to verify the accuracy of the information contained herein and to determine the undersigned's creditworthiness. The Lender is further authorized to respond to any inquiries from others concerning the Lender's credit experience with the undersigned.

Signature:	Date:
Signature:	Date: