

Personal Financial Statement

Date:

Personal Information

Name:

Address:

City, State, Zip:

Phone:

Email:

Date of Birth:

Social Security #:

Employer:

Position/Title:

Length of Employment:

Assets

| Description | Amount (\$) |
|---------------------------------|-------------|
| Cash on Hand & In Banks | |
| Marketable Securities | |
| Retirement Accounts | |
| Cash Value of Life Insurance | |
| Real Estate Owned | |
| Personal Property (Autos, etc.) | |
| Other Assets (Detail) | |
| Total Assets | |

Liabilities

| Description | Amount (\$) |
|----------------------------|-------------|
| Notes Payable to Banks | |
| Credit Card Debt | |
| Installment Loans | |
| Mortgages on Real Estate | |
| Other Liabilities (Detail) | |
| Total Liabilities | |

Annual Income

| |
|---------------------|
| Salary |
| Bonuses/Commissions |
| Rental Income |
| Interest/Dividends |
| Other (Specify) |

Annual Expenses

| |
|-----------------|
| Mortgage/Rent |
| Loan Payments |
| Taxes |
| Insurance |
| Living Expenses |
| Other Expenses |

Schedule of Real Estate Owned

| Property Address | Type | Market Value | Mortgage Balance | Monthly Payment | Rental Income |
|------------------|------|--------------|------------------|-----------------|---------------|
| | | | | | |
| | | | | | |
| | | | | | |

Additional Information

Are you a co-maker,
endorser or guarantor on any
loan?

Are there any lawsuits or
judgments against you?

Are any assets pledged?

Other material information:

Applicant's Signature

Date

Co-Applicant's Signature

Date