

# 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)	
<b>Total Assets</b>	

## Liabilities

<b>Description</b>	<b>Amount (\$)</b>
Notes Payable to Banks	
Credit Card Debt	
Installment Loans	
Mortgages on Real Estate	
Other Liabilities (Detail)	
<b>Total Liabilities</b>	

## 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:

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Applicant's Signature

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Date

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Co-Applicant's Signature

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Date