Personal Financial Statement

Name:		
Birth date:	Social Security Number:	
Home address:		
Business/Occupation:		
Do you have any dependents: _	If so, how many:	
Do you have a will:	_ If so please name executor: _	
Are you a defendant in any suits	s or Legal Actions:	

Ass	sets	Liak	oilities		
Cash available, on hand and unrestricted in banks	\$	Notes payable to banks, unsecured	\$		
U.S. Govt. Securities	\$	Notes payable to banks, secured	\$		
Cash surrender value of life Insurance policy	\$	Loan against life insurance policy	\$		
Publicly Traded Stocks and Securities (AMEX, NYSE)	\$	Notes payable to others	\$		
Other Stocks and bonds	\$	Accounts Payable	\$		
Accounts Receivable	\$	Taxes and assessments payable	\$		
Notes Receivable	\$	Mortgages on real estate	\$		
Real Estate (cost or market value) Do not deduct Mortgages	\$	Other liabilities – Please itemize	\$		
Automobiles in your name	\$		\$		
Other assets - Please itemize	\$		\$		
TOTAL ASSETS	\$	TOTAL LIABILITIES	\$		
NET WORTH (subtract your total liabilities from total assets) \$					

INCOME INFORMATION		CONTGENT LIABILITIES		
Salary	\$	As Guarantor	\$	
Bonus and	\$	On leases or	\$	
Commissions		contracts		
Dividends	\$	Legal Claims	\$	
Real-estate income	\$	Federal income tax	\$	
Other income – alimony,		Other - please	\$	
child supportetc.	\$	itemize	\$	
		TOTAL CONTIGENT		
TOTAL INCOME	\$	LIABILITIES	\$	

	BANKING INF	ORMATION		
Name of bank and Telephone number	Cash Balance	Type of Account i.e. saving, checking, CD		Account number and name account is under
1)	\$			
2)	\$			
3)	\$			
4)	\$			
5)	\$			
6)	\$			
Bank	king Relations (Loans, Lir (Attach additional pa			ule 1
Name of bank or Lender	a) Amount of Loan b) What was loan for?	Opening date	Term of loan	Secured, if so how?
1)	a) \$ b)			
2)	a) \$ b)			
3)	a) \$ b)			
4)	a) \$ b)			
5)	a) \$ b)			
6)	a) \$ b)			

		Notes Re	ceivable	Sche	dule 2		
	debtor and Iress	Age of Debt and Amount Owing description		Expected payment date			
1)				\$			
2)				\$			
3)			\$				
		Life Insu	ırance	Sched	lule 3		
Name of Insured	Name of Beneficiary	Name of Insurance Co	Yearly	Face amoun	Cash	against	Type of policy
1)			\$	\$	\$	\$	
2)			\$	\$	\$	\$	
3)			\$	\$	\$	\$	
		Stocks a	and Bonds	Sched	lule 4		
Name of	Security	Name Security Registered in:	To whom it is pledged	Ticker Symbol	Number of shares	Cost	Market value
1)							
2)							
3)							
4)							
5)							
6)							

	Real Estate		Schedule 5			
Address – include City and State (note if a rental property)	Title in name of	Date Acquired	Cost (Purch. Price)	Market Value	Mortgages Original Amt.	Unpaid Bal.
1)			\$	\$	\$	\$
2)			\$	\$	\$	\$
3)			\$	\$	\$	\$

The undersigned submits the above as being a true and accurate statement of his or her financial condition on the indicated date and agrees that the bank will and may rely thereon, and agrees that if any change occurs that materially reduces the means or ability of the undersigned to pay all claims or demands against him or her, the undersigned will immediately and without delay notify the said Bank, and unless the Bank is so notified it may continue to rely upon the statement herein given as a true and accurate statement of the financial condition of the undersigned. In considering this loan request from you, the bank will rely heavily on the information which you have supplied. It is most important that the information be accurate and complete. It is a federal crime to make a false statement on this application.

X		
	Signature of Person Making Statement	Date