



Individual - If you check this box, provide financial information only about yourself.

Joint, with \_\_\_\_\_ Relationship \_\_\_\_\_ If you check this box, provide Financial Information about yourself and the other person. Co-Applicant's Social Security Number \_\_\_\_\_.

## PERSONAL FINANCIAL STATEMENT OF

NOTE: Any willful misrepresentation could result in a violation of Federal Law (Sec. 18 U.S.C. 1014)

Name \_\_\_\_\_ Statement Date \_\_\_\_\_ Social Security Number \_\_\_\_\_  
 Address \_\_\_\_\_ City \_\_\_\_\_ State/Zip Code \_\_\_\_\_ Home Phone \_\_\_\_\_  
 Email Address \_\_\_\_\_ Business/Occupation \_\_\_\_\_ Business Phone \_\_\_\_\_

**NOTE: Complete all of Section II BEFORE Section I**

### SECTION I

ASSETS	Value/Amount	Liabilities	Value/Amount
1 Cash on Hand & in Bank(s) <span style="float: right;">Sec. II-A</span>		19 Notes Due to banks <span style="float: right;">Sec. II-A</span>	
2 Cash Value of Life Insurance <span style="float: right;">Sec. II-B</span>		20 Notes Due to Others <span style="float: right;">Sec. II-H</span>	
3 U.S. Government Securities <span style="float: right;">Sec. II-C</span>		21 Accounts & Bills Payable <span style="float: right;">Sec. II-H</span>	
4 Other Marketable Securities <span style="float: right;">Sec. II-C</span>		22 Unpaid Income Taxes <input type="checkbox"/> Federal <input type="checkbox"/> State	
5 Notes & Accts Receivable (current) <span style="float: right;">Sec. II-D</span>		23 Other Unpaid Taxes & Interest	
6 Other Assets Readily Convertible to Cash - Itemize		24 Loans on Life Insurance Policies <span style="float: right;">Sec. II-B</span>	
7		25 Other Liabilities Due Within One Year - Itemize	
8		26	
9 <b>TOTAL CURRENT ASSETS</b>		27 <b>TOTAL CURRENT LIABILITIES</b>	
10 Real Estate Owned <span style="float: right;">Sec. II-E</span>		28 Real Estate Mortgages Payable <span style="float: right;">Sec. II-E</span>	
11 Mortgages & Contracts Owned <span style="float: right;">Sec. II-F</span>		29 Liens & Assessments Payable	
12 Notes & Accts Receivable (noncurrent) <span style="float: right;">Sec. II-D</span>		30 Other Debts - Itemize	
13 Notes Due From Relatives & Friends <span style="float: right;">Sec. II-D</span>		31	
14 Other Securities - Not Readily Marketable <span style="float: right;">Sec. II-C</span>		32	
15 Personal Property <span style="float: right;">Sec. II-G</span>		33 <b>TOTAL LIABILITIES</b>	
16 Other Assets - Itemize		34	
17		35 Net Worth	
18 <b>TOTAL ASSETS</b>		36 <b>TOTAL LIABILITIES &amp; NET WORTH</b>	

ANNUAL INCOME	ESTIMATE OF ANNUAL EXPENSES
Salary, Bonuses & Commissions \$	Income Taxes \$
Dividends & Interest \$	Other Taxes \$
Rental & Lease Income \$	Insurance Premiums \$
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. \$	Mortgage Payments \$
	Rent Payable \$
	Other Expenses \$
Provide the following information only if this is a Joint statement	\$
Co-Borrower's Salary, Bonuses & Commissions \$	\$
Other Income - Itemize \$	\$
<b>TOTAL</b>	<b>TOTAL</b>

GENERAL INFORMATION	CONTINGENT LIABILITIES
Are Any Assets Pledged? <input type="checkbox"/> No <input type="checkbox"/> Yes (See Section II)	As Endorser, Co-maker or Guarantor \$
Are you a Defendant in any Suits or Legal Actions? <input type="checkbox"/> No <input type="checkbox"/> Yes	On Leases or Contracts \$
(Explain):	Legal Claims \$
Have you been declared Bankrupt in the last 10 years? <input type="checkbox"/> No <input type="checkbox"/> Yes	Federal-State Income Taxes \$
(Explain):	Other \$

SECTION II

A CASH IN BANKS AND NOTES DUE TO BANKS (List all Real Estate Loans in Section II-E)

NAME OF BANK	Account Type	Ownership	On Deposit	Notes Due to Banks	COLLATERAL (If Any) & Ownership Type
			\$	\$	
Cash on Hand					

(Enter Sec. 1 Line 1) (Enter Sec. 1 Line 19)

B LIFE INSURANCE (List only those Policies that you own)

COMPANY	Face Value of Policy	Cash Value	Loans Sec. by Policy	BENEFICIARY
TOTALS				

(Enter Sec. 1 Line 2) (Enter Sec. 1 Line 24)

C SECURITIES OWNED (Including U.S. Govt. Bonds and all other Stocks and Bonds)

Face Value-Bonds No. Shares-Stock	DESCRIPTION	Type of Ownership	COST	Current Market Value	Value of Non-Marketable Securities	Amount Pledged to Secure Loans
TOTAL						

(Enter Sec. 1 Line 14)

D NOTES & ACCOUNTS RECEIVABLE (Money Payable or Owed to You Individually-Indicate by "X" if Others have an Ownership Interest)

MAKER/DEBTOR	x	When Due	Orig. Amount	Balance Due	COLLATERAL (If Any)
TOTAL					

(Enter Sec. 1 Line 5)

E REAL ESTATE OWNED (Indicate by "X" if Others have an Ownership Interest)

TITLE IN NAME OF	x	Description & Location	Original Cost	Current Market Value of R/E	Date Acquired	MORTGAGE PAYABLE			
						Bal. Due	Payment	Maturity	To Whom
TOTAL					TOTAL				

(Enter Sec. 1 Line 10)

(Enter Sec. 1 Line 28)

F MORTGAGES & CONTRACTS OWNED (Indicate by "X" if Others have an Ownership Interest)

NAME	x	ADDRESS	PROPERTY COVERED	Maturity	Starting Date	Mtg.	Contr.	Balance Due
TOTAL								

(Enter Sec. 1 Line 11)

G PERSONAL PROPERTY (Indicate by "X" if Others have an Ownership Interest)

DESCRIPTION	Date When New	Cost When New	Value Today	X	LOANS ON PROPERTY	
					To Whom Payable	Bal. Due
TOTAL						

(Enter Sec. 1 Line 15)

H NOTES, ACCOUNTS, & BILLS PAYABLE (Other than Bank, Mortgage, and Insurance Company Loans)

PAYABLE TO	Notes Payable	Accts. Payable	Bills Payable	When Due	COLLATERAL (If Any)
TOTAL					

(Enter Sec. 1 Line 20)

(Enter Sec. 1 Line 21)

For the purpose of procuring credit from time to time, I/We furnish the forgoing as a true and accurate statement of my/our financial condition. Authorization is hereby given to the Lender to verify in any manner it deems appropriate any and all items indicated on this statement. The undersigned also agrees to notify the Lender immediately in writing of any significant adverse change in such financial condition.

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