

PERSONAL FINANCIAL STATEMENT AS OF _____

SUBMITTED TO: _____ Date

PERSONAL INFORMATION							
APPLICANT (NAME)				CO-APPLICANT (NAME)			
Employer				Employer			
Address of Employer				Address of Employer			
Business Phone No.	No. of Years with Employer	Title/Position		Business Phone No.	No. of Years with Employer	Title/Position	
Name of previous employer & position (if with current employer less than 3 yrs.)			No. of Yrs.	Name of previous employer & position (if with current employer less than 3 yrs.)			No. of Yrs.
Home Address				Home Address			
Home Phone No.	Social Security No.	Date of Birth		Home Phone No.	Social Security No.	Date of Birth	
Name, Phone No. of your Accountant				Name, Phone No. of your Accountant			
Name, Phone No. of your Attorney				Name, Phone No. of your Attorney			
Name, Phone No. of your Investment Advisor/Broker				Name, Phone No. of your Investment Advisor/Broker			
Name, Phone No. of your Insurance Advisor				Name, Phone No. of your Insurance Advisor			

Cash Income & Expenditures Statement For Year Ended _____ (Omit cents)

ANNUAL INCOME	ANNUAL EXPENDITURES
Salary (applicant) \$	Federal Income and Other Taxes \$
Salary (co-applicant)	State Income and Other Taxes \$
Bonuses & Commissions (applicant)	Rental Payments, Co-op, or Condo Maintenance
Bonuses & Commissions (co-applicant)	Mortgage Payments Residential Investment
Rental Income	Property Taxes Residential Investment
Interest Income	Interest & Principal Payments on Loans
Dividend Income	Insurance
Capital Gains	Investments (including tax shelters)
Partnership Income	Alimony/Child Support
Other Investment Income	Tuition
Other Income (List)**	Other Living Expenses
	Medical Expenses
	Other Expense (List)
TOTAL INCOME > \$	TOTAL EXPENDITURES > \$

Any significant changes expected in the next 12 months? Yes No (If yes, attach information.)

** Income from alimony, child support, or separate maintenance income need not be revealed if the applicant or co-applicant does not wish to have it considered as a basis for repaying this obligation.