

### Personal Financial Statement

TO: \_\_\_\_\_  
Type of credit - Mark with an X  
 Individual - If you mark this space, provide information only about yourself  
 Joint, with \_\_\_\_\_ Relationship \_\_\_\_\_ If you mark this space, provide information about yourself and the other person.

**PERSONAL FINANCIAL STATEMENT OF**  
**(Note: Any willful misrepresentation could result in a violation of Federal Law (Sec. 18 U.S.C. 1014))**

Name: \_\_\_\_\_ Birth Date: \_\_\_\_\_ Sec. Sec. Num: \_\_\_\_\_ Statement Date: \_\_\_\_\_  
Address: \_\_\_\_\_ # of Dependents: \_\_\_\_\_ Home Phone Number: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_ Business/Occupation: \_\_\_\_\_ Business Phone: \_\_\_\_\_

ASSETS		Amount		LIABILITIES		Amount		
1	Cash on Hand & in Banks	Sec. II-A	\$ -	21	Notes Due to Banks	Sec. II-A	\$ -	
2	Cash Value of Life Insurance	Sec. II-B	\$ -	22	Notes Due to Relatives & Friends	Sec. II-H	\$ -	
3	U.S. Government Securities	Sec. II-C	\$ -	23	Notes Due Others	Sec. II-H	\$ -	
4	Other Marketable Securities	Sec. II-C	\$ -	24	Accounts & Bills Payable	Sec. II-H	\$ -	
5	Notes & Accounts Receivable - Good	Sec. II-D	\$ -	25	Unpaid Income Taxes Due		\$ -	
6	Other Assets Readily Convertible to Cash	Itemize	\$ -	26	Other Unpaid Taxes & Interest		\$ -	
7				27	Loans on Life Insurance Policies	Sec. II-B	\$ -	
8				28	Contract Accounts Payable	Sec. II-H	\$ -	
9				29	Cash Rent Owed		\$ -	
10	Total Current Assets		\$ -	30	Other Liabilities Due within 1 year	Itemize	\$ -	
11	Real Estate Owned	Sec. II-E	\$ -	31				
12	Mortgages & Contracts Owned	Sec. II-F	\$ -	32				
13	Notes & Accounts Receivable - Doubtful	Sec. II-D	\$ -	33	Total Current Liabilities		\$ -	
14	Notes Due from Relatives & Friends	Sec. II-D	\$ -	34	Real Estate Mortgages Payable	Sec. II-E	\$ -	
15	Other Securities - Not Readily Marketable	Sec. II-C	\$ -	35	Liens & Assessments Payable		\$ -	
16	Personal Property	Sec. II-G	\$ -	36	Other Debts	Itemize	\$ -	
17	Other Assets	Itemize	\$ -	37				
18				38	Total Liabilities		\$ -	
19				39	Net Worth (Assets minus Liabilities)		\$ -	
20	Total Assets		\$ -	40	Total Liabilities & Net Worth		\$ -	
<b>ANNUAL INCOME</b>				<b>Estimate of Annual Expenses</b>				
Salary, Bonuses & Commissions				\$0.00		Income Taxes		\$0.00
Dividends & Interest				\$0.00		Other Taxes		\$0.00
Rental & Lease Income (Net)				\$0.00		Insurance Premiums		\$0.00
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		\$0.00
Other Income - Itemize						Rent Payable		\$0.00
						Other Expenses:		\$0.00
						Farm Land Payment		\$0.00
<b>If Joint Credit is Checked Above, Other Persons Salary, Bonuses &amp; Commissions</b>				\$ -				
<b>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</b>								
<b>Other Income of Other Person</b>				\$0.00				
<b>TOTAL</b>				\$ -		<b>TOTAL</b>		\$ -
<b>General Information</b>				<b>Yes/No</b>		<b>Contingent Liabilities</b>		<b>Amount</b>
Are Any Assets Pledged? (see Section II)						As an Endorser, Co-maker or Guarantor		\$0.00
Are you a Defendant in any Suits or Legal Actions (Explain)						On Leases or Contracts		\$0.00
Have you ever been declared Bankrupt in the past 10 years? (Explain)						Legal Claims		\$0.00
						Federal - State Income Taxes		\$0.00
						Other:		\$0.00

#### SECTION II

A. CASH IN BANKS AND NOTES DUE TO BANKS (list all real estate loans in Section II-E)

Name of Bank	Type of Account	Type of Ownership	On Deposit	Notes Due Banks	Collateral (if any) & Type of Ownership
			\$0.00		
<b>Cash on Hand</b>					
<b>Totals</b>			\$ -	\$ -	

(Sec. 1 line 1) (Sec. 1 line 21)

B. LIFE INSURANCE (list only those policies that you own)

Company	Policy Face Value	Cash Surrender Value	Policy Loan from Insurance Company	Other Loans with Policy as Collateral	Beneficiary
		\$0.00			
<b>Totals</b>		\$ -	\$ -		

(Sec. I line 2) (Sec. I line 27)

C. SECURITIES OWNED (including U.S. Gov't. Bonds and all other Stocks and Bonds)