PERSONAL FINANCIAL STATEMENT

CONFIDENTIAL

Social Security Number or Tax ID: _____

NAME(S): _____

_____

HOME ADDRESS: _____

_____

_____

HOME PHONE: _____

☐ Office - Home

☐ Office - Office

☐ Home - Office

☐ Home - Home

☐ Home - Home

Assets	Dollar Amount	Liabilities and Net Worth	Dollar Amount
Cash on hand and in Banks (Total Schedule A)	$	Notes Payable to Banks (Total Schedule F)	$
U.S. Government Securities (Total Schedule B)		Notes Payable to Others (Total Schedule F)	
Listed Securities (Total Schedule C)		Accounts Payable	
Unlisted Securities (Total Schedule D)		Notes Payable (Schedule F)	
Notes Receivable (Total Schedule E)		Notes Payable (Other)	
Accounts Receivable (Total)		Accounts Payable (Total)	
Real Estate Owned (Total Schedule G)		Taxes Payable	
Mortgages and Land Contracts Receivable (Total Schedule H)		Real Estate Mortgages Payable (Total Schedule G)	
Life Insurance		Life Insurance Loans	
Cash Value of Life Insurance (Total Schedule I)		Life Insurance Premiums Due (Total Schedule I)	
Other Assets (Total)		Other Liabilities (Total Schedule J)	
		Other Liabilities (Total)	
		Total Liabilities	$
		Net Worth	$
Total Assets	$	Total Liabilities and Net Worth	$

Contingent Liabilities	Dollar Amount	General Information
Endorser	$	Marital Status
Accommodation Endorser		Number of Dependents: Ages:
Guarantor		Spouse's Name
Joint Venture		Spouse's Employer: Position:
Pending Suits		Spouse's Income:
Federal Income Tax Liability		Other Income: Source:
		Are you a citizen of the United States? Yes ☐ No ☐
Other	$	
Total Contingent Liabilities (Total Schedule K)		Have you ever been bankrupt? Yes ☐ No ☐
Schedule A: Cash on Hand and in Banks (Total Schedule A)		
Schedule B: U.S. Government Securities (Total Schedule B)		Have you been adjudged a bankrupt within the last five years?
Schedule C: Listed Securities (Total Schedule C)		
Schedule D: Unlisted Securities (Total Schedule D)		Have you been a defendant in a lawsuit?