

Type of credit - Mark with an X

<input type="checkbox"/>
<input type="checkbox"/>

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. 16 U.S.C. 1014))

Name: \_\_\_\_\_ Birth Date: \_\_\_\_\_ Soc. Sec. Num: \_\_\_\_\_ Statement Date: \_\_\_\_\_

Address: \_\_\_\_\_ # of Dependents: \_\_\_\_\_ Home Phone Number: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_ Business/Occupation: \_\_\_\_\_ Business Phone: \_\_\_\_\_

**Note: Complete All of Section II before Section I**

**Section I**

ASSETS		Amount	LIABILITIES		Amount
1	Cash on Hand & in Banks	Sec. II-A \$ -	21	Notes Due to Banks	Sec. II-A \$ -
2	U.S. Government Securities (not in retirement acct)	Sec. II-C \$ -	22	Notes Due to Relatives & Friends	Sec. II-H \$ -
3	Other Marketable Securities (not in retirement acct)	Sec. II-C \$ -	23	Notes Due Others	Sec. II-H \$ -
4	Other Assets Readily Convertible to Cash	Itemize	24	Accounts & Bills Payable	Sec. II-H \$ -
5			25	Unpaid Income Taxes Due	
6			26	Other Unpaid Taxes & Interest	
7	Total Liquid Assets	\$ -	27	Loans on Life Insurance Policies	Sec. II-B \$ -
8	Cash Value of Life Insurance	Sec. II-B \$ -	28	Contract Accounts Payable	Sec. II-H \$ -
9	Other Securities - Not Readily Marketable	Sec. II-C \$ -	29	Cash Rent Owed	
10	Retirement Accounts (IRA, 401K, etc.)		30	Other Liabilities Due within 1 year	Itemize
11	Notes & Accounts Receivable - Good	Sec. II-D \$ -	31		
12	Notes & Accounts Receivable - Doubtful	Sec. II-D \$ -	32		
13	Notes Due from Relatives & Friends	Sec. II-D \$ -	33	Total Current Liabilities	\$ -
14	Real Estate Owned	Sec. II-E \$ -	34	Real Estate Mortgages Payable	Sec. II-E \$ -
15	Mortgages & Contracts Owned	Sec. II-F \$ -	35	Liens & Assessments Payable	
16	Personal Property	Sec. II-G \$ -	36	Other Debts	Itemize
17	Other Assets	Itemize	37		
18			38	<b>Total Liabilities</b>	\$ -
19			39	<b>Net Worth (Assets minus Liabilities)</b>	\$ -
20	<b>Total Assets</b>	\$ -	40	<b>Total Liabilities &amp; Net Worth</b>	\$ -

ANNUAL INCOME	Amount	Estimate of Annual Expenses	Amount
Salary, Bonuses & Commissions		Income Taxes	
Dividends & Interest		Other Taxes	
Rental & Lease Income (Net)		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	
Other Income - Itemize		Rent Payable	
		Living Expenses	
		Other Expenses	
<b>If Joint Credit is Checked Above, Other Persons Salary, Bonuses &amp; Commissions</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			
Other Income of Other Person			
<b>TOTAL</b>	\$ -	<b>TOTAL</b>	\$ -