

**PERSONAL FINANCIAL STATEMENT WORKSHEET**

APPLICANT	
FULL NAME _____	EMPLOYMENT/ NAME OF BUSINESS (IF SELF EMPLOYED ) _____
RESIDENCE ADDRESS _____	POSITION _____
CITY STATE & ZIP _____	BUSINESS ADDRESS _____
PHONE _____	BUSINESS PHONE _____
D.O.B _____ SSN _____	NUMBER OF DEPENDENTS _____
	DRIVER'S LICENSES NO. _____

CO-APPLICANT OR SPOUSE	
FULL NAME _____	EMPLOYMENT/ NAME OF BUSINESS (IF SELF EMPLOYED) _____
RESIDENCE ADDRESS _____	POSITION _____
CITY STATE & ZIP _____	BUSINESS ADDRESS _____
PHONE _____	BUSINESS PHONE _____
D.O.B _____ SSN _____	DRIVER'S LICENSES NO. _____

ASSETS		LIABILITIES & NET WORTH	
	Current Value		Balance Owng
1. Cash (on hand & in banks) (see schedule 1)	\$ 0	13. Notes Payable, Banks, Unsecured (see schedule 7)	\$
2. US Government & Agency Securities (see schedule 2)	\$	14. Notes Payable, Banks, Secured (see schedule 7)	\$
3. Marketable Securities (see schedule 2)	\$	15. Notes Payable, Others (see schedule 7)	\$
4. Non-Marketable Securities (see schedule 3)		16. Loans Against Life Insurance (see schedule 4)	\$
5. Notes Receivable--Itemize	\$	17. Accounts & Bills Payable (see schedule 7)	\$
6. Cash Value--Life Insurance (do not deduct loan) (see schedule 4)	\$	18. Real Estate Mortgages Payable (see schedule 5)	\$
7. Real-estate in Own Name (see schedule 4)	\$	19. Income Taxes Due	\$
8. Partial Interests in Real Estate--Net Equity Values (see schedule 6)	\$	20. State Taxes Due	\$
9. Automobiles Year_Make _____	\$	21. Alimony/Child Support	\$
10. Furniture and Personal Property	\$	22. Other Liabilities--itemize	
11. Other Assets--Itemize	\$	Mortgage on partial interest in real estate (sch. 6)	\$
	\$		
		<b>23. TOTAL LIABILITIES</b>	\$
		<b>22. Net Worth</b> (Total Assets Less Total Liabilities)	\$
	\$		