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**PERSONAL FINANCIAL STATEMENT**

Applicant Name \_\_\_\_\_ Social Security # \_\_\_\_\_  
 Home Address \_\_\_\_\_ City \_\_\_\_\_ ST \_\_\_\_\_ Zip \_\_\_\_\_  
 Home Phone: \_\_\_\_\_ Business Phone: \_\_\_\_\_ Email \_\_\_\_\_

Co - Applicant \_\_\_\_\_ Social Security # \_\_\_\_\_  
 Home Address \_\_\_\_\_ City \_\_\_\_\_ ST \_\_\_\_\_ Zip \_\_\_\_\_  
 Home Phone: \_\_\_\_\_ Business Phone: \_\_\_\_\_ Email \_\_\_\_\_

<p><b>ASSETS</b></p> <p>Cash on hand and in banks \$ _____</p> <p>U.S. Gov. Securities – See schedule \$ _____</p> <p>Listed Securities – See Schedule \$ _____</p> <p>Unlisted Securities – See Schedule \$ _____</p> <p>Accounts and Notes Receivable                  Due from relatives and friends _____</p> <p>Accounts and Notes Receivable                  Due from others – good _____</p> <p>Accounts and Notes Receivable                  Doubtful _____</p> <p>Real Estate owned – See Schedule _____</p> <p>Real Estate Mortgages Receivable _____</p> <p>Automobiles and other Personal Property _____</p> <p>Cash Value – Life Insurance _____</p> <p>Other assets – Itemize _____</p> <p>_____</p> <p>_____</p> <p><b>TOTAL ASSETS</b> \$ _____</p>	<p><b>LIABILITIES</b></p> <p>Notes payable to Banks – Secured \$ _____</p> <p>Notes payable to Banks – Unsecured \$ _____</p> <p>Notes payable to relatives _____</p> <p>Notes payable to others _____</p> <p>Accounts and bills due _____</p> <p>Unpaid Income Tax \$ _____</p> <p>Other unpaid taxes and interest _____</p> <p>Real Estate Mortgages                  Payable – See Schedule _____</p> <p>Chattel Mortgages and other                  Liens payable _____</p> <p>Other debts – Itemize _____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p><b>TOTAL LIABILITES</b> \$ _____</p> <p><b>TOTAL ASSETS</b> \$ _____</p> <p><i>TOTAL ASSETS MINUS LIABILITIES EQUALS NET WORTH</i></p> <p><b>NET WORTH</b> \$ _____</p>
<p><b>SOURCES OF INCOME</b></p> <p>Salary \$ _____</p> <p>Bonus and Commissions _____</p> <p>Dividends _____</p> <p>Real Estate income _____</p> <p>Other income – Itemize _____</p> <p>_____</p> <p><b>TOTAL</b> \$ _____</p>	<p><b>PERSONAL INFORMATION</b></p> <p>Business or occupation _____ Age _____</p> <p>Partner or officer in any other venture _____</p> <p>Married _____ Children _____</p> <p>Single _____ Dependents _____</p>
<p><b>CONTINGENT LIABILITIES</b></p> <p>As endorser, co-maker, or guarantor on leases or contracts \$ _____</p> <p>Legal claims _____</p> <p>Provision for Federal Income Taxes _____</p> <p>Other special debt _____</p> <p>_____</p>	<p><b>GENERAL INFORMATION</b></p> <p>Are any assets pledged? _____ See Schedule</p> <p>Are you defendant in any suits or legal actions? _____</p> <p>Personal Bank Accounts carried at: _____</p> <p>Have you ever taken bankruptcy? Explain: _____</p> <p>_____</p>

Initials \_\_\_\_\_

**SCHEDULE OF U.S. GOVERNMENT BONDS/STOCKS AND BONDS OWNED**

No. of shares or Face Value (Bonds)	Description	In name of	Market value

**SCHEDULE OF REAL ESTATE MORTGAGES RECEIVABLE**

Description of Property Covered	Date of Acquisition	In name of	Amount	Maturity

**SCHEDULE OF REAL ESTATE OWNED**

Description of Property and Improvements	Date Acquired	Title in Name of	Cost	Market Value	Mortgage	
					Amount	Maturity

**SCHEDULE OF LIFE INSURANCE CARRIED, INCL. N.S.L.I. AND GROUP INSURANCE**

Amount	Name of Company	Beneficiary	Cash Surrender Value	Loans

**SCHEDULE OF ASSETS PLEDGED**

Description	Value	To Whom Pledged

**GIVE NAMES OF BANKS OR FINANCE COMPANIES WHERE CREDIT HAS BEEN OBTAINED**

Name	Date	High Credit	Basis

THE UNDERSIGNED CERTIFIES THAT BOTH SIDES HEREOF AND THE INFORMATION INSERTED THEREIN HAS BEEN CAREFULLY READ AND IS TRUE AND CORRECT.

**X** \_\_\_\_\_

**Date:** \_\_\_\_\_

**X** \_\_\_\_\_

**Date:** \_\_\_\_\_