



## Personal Financial Statement

**Name:** \_\_\_\_\_ **Spouse Name:** \_\_\_\_\_  
**Address:** \_\_\_\_\_ **Social Security Number:** \_\_\_\_\_  
 \_\_\_\_\_ **Spouse Social Security Number:** \_\_\_\_\_  
**Telephone:** \_\_\_\_\_ **Business Telephone:** \_\_\_\_\_  
**Business or Occupation:** \_\_\_\_\_  
**Partner or Officer in any other venture?** \_\_\_\_\_  
**Are any assets pledged?** \_\_\_\_\_  
**Have you ever made a composition settlement or filed bankruptcy? Please explain:** \_\_\_\_\_

For the purpose of procuring and maintaining credit from time to time in any form whatsoever with above named Surety, for claims and demands against the undersigned, the undersigned submits the following as being a true and accurate statement of its financial condition on the following date, and agree that if any change occurs that materially reduces the means or ability of the undersigned to pay all claims or demands against it, the undersigned will immediately and without delay notify the said Surety, and unless the Surety is so notified it may continue to rely upon the statement herein given as a true and accurate statement of the financial condition of the undersigned as of the close of business \_\_\_\_\_ 20\_\_ Income from alimony, child support or maintenance payments need not be revealed if the undersigned does not choose to disclose such income in applying for credit.

### ASSETS

### LIABILITIES AND NET WORTH

Cash On Hand and in Banks (shedule 1)	\$	Notes Payable to Banks – Secured (schedule1)	\$
U.S. Government Securities	\$	Unsecured (schedule 1)	\$
Accounts, Loans and Notes Receivable ( Schedule 2)	\$	Notes Payable to Relatives	\$
Cash Surrender Value Life Insurance (Schedule 3)	\$	Accounts and Notes Pavable to Others	\$
Other Stocks and Bonds (Schedule 4)	\$	Rents and Interest Due	\$
Real Estate (Schedule 5)	\$	Taxes Due (Schedule 5)	\$
Automobiles - Number ( )	\$	Liens on Real Estate (Schedule 5)	\$
Other Assets (itemize)	\$	Other Liabilities (Itemize)	\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
		<b>TOTAL LIABILITIES</b>	\$
		<b>NET WORTH</b>	\$
<b>TOTAL ASSETS</b>	<b>\$</b>	<b>TOTAL LIABILITIES AND NET WORTH</b>	<b>\$</b>

### INCOME

### CONTINGENT LIABILITIES

Salary	\$	As Endorser or Co-Maker	\$
Bonus and Commissions	\$	On loans or Contracts	\$
Dividends and Interest	\$	Legal Claims	\$
Real Estate Income	\$	Provisions for Federal Income Tax	\$
		Other Special Debt	\$
<b>TOTAL INCOME</b>	<b>\$</b>		

### INSURANCE COVERAGE

### COMPARISON OF MONTHLY INCOME AND EXPENSES

Fire Insurance - Buildings	\$	Net Monthly Income	\$
Household Effects and Autos	\$	Rent or Home Payment	\$
Liability Insurance - Automobiles	\$	Food and Utilities	\$
Personal	\$	Incidentals	\$
General Public	\$	Avg. Amt. Paid on Open Accts.	\$
Other insurance	\$	<b>TOTAL EXPENSES</b>	\$
		<b>DIFFERENCE BETWEEN INCOME AND EXPENSES</b>	\$

## SCHEDULES

### No. 1 Banking Relations (A list of all my bank savings and loan accounts)

Name and Location	Cash Balance	Amount of Loan	Maturity of Loan	How Endorsed Guaranteed or Secured
	\$	\$		
	\$	\$		
	\$	\$		
	\$	\$		
	\$	\$		

### No. 2 Accounts, Loans, and Notes Receivable (A list of the largest amounts owing to me)

Name and Address of Debtor	Amount Owing	Age of Debt	Description or Nature of Debt	Description of Security Held	Date Payment Expected
	\$				
	\$				
	\$				
	\$				
	\$				

### No. 3 Life Insurance

Name of Person Insured	Name of Beneficiary	Name of Insurance Co.	Type of Policy	Face Amount of Policy	Total Cash Surrender Value	Total Loans Yearly Policy	Amount of Yearly Premium	Is Policy Assigned?
				\$	\$		\$	
				\$	\$		\$	
				\$	\$		\$	

### No. 4 Other Stocks and Bonds

Face Value Bonds No. Stock Shares	Description of Security	Registered in Name of	Cost	Present Market Value	Income Receivable Last Year	If Pledged, State to Whom
\$			\$	\$	\$	
\$			\$	\$	\$	
\$			\$	\$	\$	
\$			\$	\$	\$	
\$			\$	\$	\$	

### No. 5 Real Estate. The legal and equitable title to all the real estate listed in this statement is solely in the name of the undersigned, except as follows:

Description or Street No.	Dimensions or Acres	Improvements Consist of	Mortgage or Liens	Due Dates & Amounts of Payments	Assessed Value	Present Market Value	Unpaid Taxes	
							Year	Amt.
					\$	\$		\$
					\$	\$		\$
					\$	\$		\$
					\$	\$		\$

The undersigned certifies that the information inserted on both pages hereof has been carefully read and is true and correct. I/WE AUTHORIZE THE COMPANY TO INVESTIGATE MY STATEMENTS AND TO CHECK MY/OUR CREDIT WITH ANY CREDITORS OR LENDING INSTITUTIONS

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

Signed: \_\_\_\_\_