



PERSONAL FINANCIAL STATEMENT AS OF _____

PERSONAL INFORMATION					
APPLICANT (NAME)			CO-APPLICANT (NAME)		
Employer			Employer		
Address of Employer			Address of Employer		
Business Phone No.	No. of Years With Employer	Title/Position	Business Phone No.	No. of Years With Employer	Title/Position
Home Address			Home Address		
Home Phone No.	Social Security No.	Date of Birth	Home Phone No.	Social Security No.	Date of Birth
Drivers License No.	State	Issue Date Expiration Date	Drivers License No.	State	Issue Date Expiration Date

Balance Sheet as of _____			
ASSETS	AMOUNT (\$)	LIABILITIES	AMOUNT (\$)
Cash in this Bank (including money market accounts, CDs)		Notes Payable to this Bank Secured	
Cash in Other Financial Institutions (List) (including money market accounts, CDs)		Unsecured	
Readily Marketable Securities (Schedule A)		Notes Payable to Others (Schedule E) Secured	
Non-Readily marketable Securities (Schedule A)		Unsecured	
Accounts and Notes Receivable		Accounts Payable (including credit cards)	
Net Cash Surrender Value of Life Insurance (Schedule B)		Margin Accounts	
Residential Real Estate (Schedule C)		Notes Due: Partnership (Schedule D)	
Real Estate Investments (Schedule C)		Taxes Payable	
Partnerships/PC Interests (Schedule D)		Mortgage Debt (Schedule C)	
IRA, Keogh, Profit-Sharing & Other Vested Retirement Accts.		Life Insurance Loans (Schedule B)	
Deferred Income (number of years deferred _____)		Other Liabilities (List):	
Personal Property (including automobiles)		TOTAL LIABILITIES	
Other Assets (List):		NET WORTH	

CONTINGENT LIABILITIES	YES	NO	AMOUNT
Are you a guarantor, co-maker, or endorser for any debt of an individual, corporation, or partnership?			\$ _____
Are you aware of any pending or outstanding civil judgments filed against you?			\$ _____
Do you have any outstanding letters of credit or surety bonds, suits or legal actions against you?			\$ _____
Are any of your tax obligations past due and/or do you have any tax liens filed against you?			\$ _____
What would be your total estimated tax liability if you were to sell your major assets?			\$ _____
If yes for any of the above, give details: _____			

Schedule A – All Securities (including portfolio statements as attachments)							
No. of Shares (Stock) or Face Value (Bonds)	DESCRIPTION	OWNER(S)	WHERE HELD	COST	CURRENT MARKET VALUE	PLEGGED	
						YES	NO
READILY MARKETABLE SECURITIES (including U.S. Governments and Municipals)*							
NON-READILY MARKETABLE SECURITIES (closely held, thinly traded, or restricted stock)							

* If not enough space, attach a separate schedule or brokerage statement and enter totals only.

