

PERSONAL FINANCIAL STATEMENT AS OF _____

Date

SUBMITTED TO:

PERSONAL INFORMATION

APPLICANT (NAME)			CO-APPLICANT (NAME)		
EMPLOYER			EMPLOYER		
ADDRESS of EMPLOYER			ADDRESS of EMPLOYER		
BUSINESS PHONE	No. YEARS	TITLE / POSITION	BUSINESS PHONE	No. YEARS	TITLE / POSITION
NAME OF PREVIOUS EMPLOYER & POSITION (IF WITH CURRENT EMPLOYER LESS THAN 3 YRS) No. of Yrs			NAME OF PREVIOUS EMPLOYER & POSITION (IF WITH CURRENT EMPLOYER LESS THAN 3 YRS) No. of Yrs		
HOME ADDRESS			HOME ADDRESS		
HOME PHONE	SOCIAL SECURITY No.	DATE of BIRTH	HOME PHONE	SOCIAL SECURITY No.	DATE of BIRTH

STATEMENT of ASSETS & LIABILITIES AS OF : (Date)

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DIRECT ASSETS		AMOUNT	DIRECT LIABILITIES		AMOUNT
CASH or EQUIVALENT	CHECKING (From Schedule 1)		Life insurance loans (from Sched. 2A)		
	SAVINGS (From Schedule 1)				
	MONEY MARKET / CERTIFICATES (From Schedule 1)		Loans owing banks & others (Sched.9)		
Cash value life ins. ~ from Schedule 2A(not face value - do not deduct loans)			Accounts & Bills Owing		
Fully marketable securities ~ from Schedule 3			Taxes Owing		
Non-marketable securities ~ from Schedule 4			Mortgages Owing (Sched. 6)		
Accounts/notes receivable ~ from Schedule 5			Other liabilities (Describe)		
Real estate for personal use ~ from Schedule 6					
Real estate investments ~ from Schedule 7					
Ownership in privately held businesses ~Sched. 8					
Automobiles *					
Personal Effects*					
Other Assets * (Describe)					
			TOTAL LIABILITIES >		\$0
			NET WORTH (assets minus liabilities) >		\$0
TOTAL ASSETS >		\$0	TOTAL LIABILITIES & NET WORTH >		\$0

* Specify cost or market value where applicable; do not include leased items

CONTINGENT LIABILITIES	YES	NO	AMOUNT
Are you a guarantor, co-maker or endorser of any debt of any individual, corporation or partnership?	<input type="checkbox"/>	<input type="checkbox"/>	\$
Do you have any outstanding letters of credit or surety bonds?	<input type="checkbox"/>	<input type="checkbox"/>	
Are there any suits or legal actions pending against you?	<input type="checkbox"/>	<input type="checkbox"/>	
Are you contingently liable on any lease or contract?	<input type="checkbox"/>	<input type="checkbox"/>	
Are any of your tax obligations past due?	<input type="checkbox"/>	<input type="checkbox"/>	
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:			

