



Personal Financial Statement

As of _____

Section 1 Borrower Information			Co-Borrower Information		
Name			Name		
Date of Birth	Social Security #		Date of Birth	Social Security #	
Residence Address			Residence Address		
City, State, Zip			City, State, Zip		
Res Phone	Bus Phone	Cell Phone	Res Phone	Bus Phone	Cell Phone
Email Address			Email Address		
Position or Occupation		No of Years	Position or Occupation		No of Years
Employer Name			Employer Name		
Nearest Relative Not Living With Me			Nearest Relative Not Living With Me		
Relationship		Phone	Relationship		Phone
Address			Address		
City, State, Zip			City, State, Zip		

Section 2 Asset Schedule

Cash and Investments (Cash in Financial Institutions, 401K, IRA, Retirement Accounts)

Type of Account	Name of Bank or Broker	In Name Of	Current Balance
Total Cash and Investments			

Real Estate Owned

Address and Type of Property	Cost	Year Acquired	Current Market Value
Total Real Estate Owned			

Vehicles, Machinery, Equipment, Personal Property

Description	In Name Of	Value
Total Vehicles, Machinery, Equipment and Personal Property		

Section 2 Asset Schedule (continued)

Other Assets (Stocks, Bonds, Cash Value of Life Insurance, Accounts Receivables, Business Interests)

Description	In Name Of	Cash Value
Total Other Assets		

Section 3 Debt Schedule

Credit Cards

Lender/Payable To	Collateral	Interest Rate	Term in Months	Monthly Payment	Current Balance
Total Credit Cards					

Vehicle/Installment Loans

Lender/Payable To	Collateral	Interest Rate	Term in Months	Monthly Payment	Current Balance
Total Vehicle/Installment Loans					

Real Estate

Lender/Payable To	Collateral	Interest Rate	Term in Months	Monthly Payment	Current Balance
Total Real Estate					

Other

Lender/Payable To	Collateral	Interest Rate	Term in Months	Monthly Payment	Current Balance
Total Other					

Section 4 Personal Information/Contingent Liabilities

Borrower	Co-Borrower
Are you a US Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No	Are you a US Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have a will? <input type="checkbox"/> Yes <input type="checkbox"/> No If so, name of executor.	Do you have a will? <input type="checkbox"/> Yes <input type="checkbox"/> No If so, name of executor.
Are you a partner or officer in any other venture? <input type="checkbox"/> Yes <input type="checkbox"/> No If so, describe.	Are you a partner or officer in any other venture? <input type="checkbox"/> Yes <input type="checkbox"/> No If so, describe.
Income tax paid through (date)	Income tax paid through (date)
Are any assets pledged other than as described on schedules? <input type="checkbox"/> Yes <input type="checkbox"/> No If so, describe.	Are any assets pledged other than as described on schedules? <input type="checkbox"/> Yes <input type="checkbox"/> No If so, describe.
Are you a defendant in any suits or legal actions? <input type="checkbox"/> Yes <input type="checkbox"/> No If so, describe.	Are you a defendant in any suits or legal actions? <input type="checkbox"/> Yes <input type="checkbox"/> No If so, describe.
Have you or your business ever been declared bankrupt? <input type="checkbox"/> Yes <input type="checkbox"/> No	Have you or your business ever been declared bankrupt? <input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have any contingent liabilities? <input type="checkbox"/> Yes <input type="checkbox"/> No As endorser, co-maker or guarantor? If so, describe.	Do you have any contingent liabilities? <input type="checkbox"/> Yes <input type="checkbox"/> No As endorser, co-maker or guarantor? If so, describe.

This statement is true and correct in every detail and accurately represents the financial condition of the Borrower(s) on the date given below.

In addition, each individual signing below authorizes the Creditor to check their individual credit account and employment history and have a credit reporting agency prepare a consumer credit report on them.

Borrower _____
Signature _____
Date Signed _____

Co-Borrower _____
Signature _____
Date Signed _____

Lender Use Only

Total Assets _____	Comments: _____ _____ _____
Total Liabilities _____	
Net Worth _____	