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PERSONAL FINANCIAL STATEMENT

AS OF DATE	BUSINESS NAME (APPLICANT OR BORROWER)	BUSINESS PHONE	PREPARED FOR (LENDER, PURPOSE)

APPLICANT

Full name

Home address

City, ST, ZIP

Phone / email

Ownership %

SPOUSE OR CO-APPLICANT

Full name

Home address

City, ST, ZIP

Phone / email

Ownership %

Assets

Asset	Amount
Cash on hand and in banks	
Savings, money market, CDs	
IRA and other retirement accounts	
Accounts and notes receivable	
Life insurance (cash surrender value)	
Stocks and bonds	
Real estate (market value)	
Automobiles	
Other personal property	
Other assets	
Total assets	

Liabilities

Liability	Monthly pmt	Balance
Accounts payable		
Notes payable to banks and others		
Installment account (auto)		
Installment account (other)		
Loans against life insurance		
Mortgages on real estate		
Unpaid taxes		
Other liabilities		

Total liabilities	
NET WORTH (assets - liabilities)	
Total liabilities and net worth	

Source of income (yearly)

Source	Details	Amount
Salary		
Net investment income		
Real estate income		
Other income		
Total yearly income		

Contingent liabilities (not in net worth)

Type	Details	Amount
As endorser or co-maker		
Legal claims and judgments		
Provision for federal income tax		
Other special debt		
Total contingent		

NOTES (PLEDGED ASSETS, OTHER PERSONAL PROPERTY, UNPAID TAXES, ANYTHING THE LENDER SHOULD KNOW)

I certify that the information in this statement and any attached schedules is true, correct and complete as of the date above. I authorize the lender to verify it and to obtain credit reports. I will tell the lender promptly of any material change.

Applicant signature | Date | Spouse / co-applicant signature | Date