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PERSONAL FINANCIAL STATEMENT SCHEDULES

NAME(S)	AS OF DATE	ATTACHED TO STATEMENT FOR (LENDER)	PAGE

Notes payable to banks and others (credit cards, lines of credit, personal loans)

Noteholder name and address	Original balance	Current balance	Payment amount	Frequency	How secured or endorsed
Total notes payable					

Stocks and bonds (brokerage accounts; list retirement accounts on the main statement)

Name of security or fund	Shares / units	Cost	Market price	Date of quote	Total value
Total stocks and bonds					

Real estate owned

Property address	Type	Date bought	Original cost	Market value	Mortgage holder	Mortgage balance	Monthly pmt	Status
Total real estate								

Life insurance held

Insurance company	Policy type	Face amount	Cash surrender value	Loan against policy	Beneficiaries
Total life insurance					

Signature	Date	Spouse / co-applicant signature	Date