PERSONAL FINANCIAL STATEMENT

IMPORTANT: Read these directions before completing this Statement:

- ☐ If you are applying for individual credit in your own name and are relying on you own income or assets and not the income or assets of another person as the basis for repayment of the credit requested, complete only Section 1 and 3.
- ☐ If your are applying for joint credit with another person, complete all Sections providing information in Section 2 about the joint applicant.
- ☐ If you are applying for individual credit, but are relying on income from alimony, child support, or separate maintenance or on the income or assets of another person as a basis for repayment of the credit requested, complete all Sections, providing information in Section 2 about the person whose alimony, support, or maintenance payments or income or assets you are relying.
- ☐ If this statement relates to your guaranty of the indebtedness of other person(s), firm(s) or corporation(s), complete Section 1 and 3.

TO: _____

_____

_____

SECTION 1 - INDIVIDUAL INFORMATION	**SECTION 2 - OTHER PARTY INFORMATION**
Name:	Name:
Residence Address:	Residence Address:
City, State & Zip:	City, State & Zip:
Position/Occupation:	Position/Occupation:
Business Name:	Business Name:
Business Address:	Business Address:
City, State & Zip:	City, State & Zip:
Res. Phone:	Res. Phone:

SECTION 3 - STATEMENT OF FINANCIAL CONDITION AS OF _____, 20 _____

ASSETS (Do not include assets of doubtful value)	**In Dollars (Omit cents)**	**LIABILITIES**	**(Omit cents)**
Cash on hand and in banks		Notes payable to banks - secured	
U.S. Gov't & Marketable Securities		Notes payable to banks - unsecured	
Non-Marketable Securities - See Schedule B		Due to brokers	
Securities held by broker in margin accounts		Amounts payable to others - secured	
Restricted or control stocks		Amounts payable to others - unsecured	
Partial interest in Real Estate Equities - see Schedule C		Accounts and bills due	
		Unpaid income tax	
Real Estate Owned - see Schedule D		Other unpaid taxes and interest	
Loans Receivable		Real estate mortgages payable see Schedule D	
Automobiles and other personal property			
Cash value - life insurance - see Schedule E		Other debts - itemize:	
Other assets - itemize			
		TOTAL LIABILITIES	
		NET WORTH	
TOTAL ASSETS		TOTAL LIAB. AND NET WORTH	

Sources of Income for Year Ended _____, 20 __	PERSONAL INFORMATION
Salary, bonuses & commissions $	Do you have a will? ___ If so, name of executor:
Dividends	
Real-estate Income	Are you a partner or officer in any other venture? If so describe:
Other Income (Alimony, child support or separate maintenance income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation	Are you obligated to pay alimony, child support, or separate maintenance payments? If so, describe:
TOTAL	Are any assets pledge other than as described on schedules? If so, describe:
CONTINGENT LIABILITIES	
Do you have any contingent liabilities? If so, describe:	Income tax settled through (date) _____
	Are you a defendant in any suits or legal actions?
As indorser, co-maker or guarantor $	Personal bank accounts carried at:
On leases or contracts	
Legal claims	
Other special debt	Have you ever been declared bankrupt? If so describe:
Amount of contested income tax liens	

(COMPLETE SCHEDULES AND SIGN ON REVERSE SIDE)