



## PERSONAL FINANCIAL STATEMENT

AS OF: \_\_\_\_\_

Name: \_\_\_\_\_ Date of Birth \_\_\_\_\_

Address: \_\_\_\_\_ Social Security No. \_\_\_\_\_

City/State/Zip \_\_\_\_\_ Residence Phone \_\_\_\_\_

Position or Occupation \_\_\_\_\_ How Long? \_\_\_\_\_

Employer Name \_\_\_\_\_

Business Address \_\_\_\_\_ Business Phone \_\_\_\_\_

City/State/Zip \_\_\_\_\_

This is a(n) check box  Individual financial Statement.  Joint financial statement with spouse. If Joint, complete the following:

Spouse \_\_\_\_\_ Date of Birth \_\_\_\_\_

Address (If different) \_\_\_\_\_ Social Security No. \_\_\_\_\_

Position or Occupation \_\_\_\_\_ How Long? \_\_\_\_\_

Employer Name \_\_\_\_\_

Business Address \_\_\_\_\_ Business Phone \_\_\_\_\_

City/State/Zip \_\_\_\_\_

**YOU MAY APPLY FOR CREDIT INDIVIDUALLY OR JOINTLY WITH ANOTHER PARTY**

If you are applying for joint credit with another party (other than your spouse), the joint application must complete a separate financial statement  
 Reflect in this statement your personal financial condition as well as the financial condition of your spouse if:

1. You are applying for credit jointly with your spouse, or
2. You are relying on your spouse's income or assets in requesting credit, or
3. You are providing this statement to support previously extended joint credit with your spouse

\* List all amounts in dollars. Omit Cents

ASSETS	AMOUNT
Deposits in Banks & Other Financial Inst (From Sch 1 pg 2)	
Cash Value of Life Insurance (From Sch 2 pg 2)	
Notes and Accounts Receivable	
Marketable Stocks & Bonds (Sch 3 pg 2)	\$0
Stocks in Closely Held Corporations (Sch 4 pg 2)	\$0
Assets of Proprietorships	
Assets in Partnerships & Joint Ventures	
Vehicles, Boats, Machinery, & Equipment (Sch 5 pg 2)	\$0
Wholly Owned Real Estate (Sch 6 pg 2)	\$0
Partially Owned Real Estate (Sch 7 pg 3)	\$0
Vested Interest in Pension/Retirement Accts (Sch 8 pg 3)	\$0
Personal Property Furniture etc.	

LIABILITIES AND NET WORTH	AMOUNT
Other Loans Payable (Sch 9 pg 3)	\$0
Loans on Life Insurance (Sch 2 pg 3)	
Taxes Due - Income	
Credit Card or Accounts Payable	
Liabilities of Proprietorships	
Liab of Partnerships/Joint Ventures	
Loans on Vehcl, Boats, Mach, & Equip (Sch 5 pg 2)	
Loans on Wholly Owned Real Estate (Sch 6 pg 3)	\$0
<b>Total Liabilities</b>	<b>\$0</b>
<b>Net Worth</b>	<b>\$0</b>

<b>TOTAL ASSETS</b>	<b>\$0</b>	<b>TOTAL LIABILITIES &amp; NET WORTH</b>	<b>\$0</b>
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Please complete all appropriate schedules. If space is inadequate, attach an additional sheet.