



**PERSONAL FINANCIAL STATEMENT OF .**

THIS STATEMENT HAS BEEN PREPARED AS OF \_\_\_\_\_ FOR \_\_\_\_\_  
DATE

(APPLICANT)		(CO-APPLICANT)	
SOCIAL SECURITY NUMBER	DATE OF BIRTH	SOCIAL SECURITY NUMBER	DATE OF BIRTH
ADDRESS		TELEPHONE NUMBER	

**ASSETS**

CASH  
{SCHEDULE 1}

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INVESTMENTS-FIONDS & STOCKS  
(SCHEDULE 2)

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ACCOUNTS & NOTES RECE IVA BLE  
(SCHEDULE 3)

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REAL ESTATE OWNED  
(SCHEDULE 4)

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CASH VALUE OF UFE INSURANCE  
(FACE VALUE \$ \_\_\_\_\_ )

AUTO	YEAR	MAKE
AUTO	YEAR	MAKE

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RETIREMENT ACCOUNTS

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OTHER ASSETS (ITEMIZE)

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TOTAL ASSETS

**LIABILITIES**

NOTES PAYABLE-UNSECURED  
{SCHEDULE 5}

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NOTES PAYABLE-SECURED  
(SCHEDULE 5)

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LOANS ON LIFE INSURANCE  
(SCHEDULE 5)

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REAL ESTATE MORTGAGES  
(SCHEDULE 4)

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INSTALLMENT LOANS  
(SCHEDULE 5)

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CHARGE CARDS

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FEDERAL INCOME TAX

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OTHER LIABILITIES (ITEMIZE)

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TOTAL LIABILITIES

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NET WORTH  
(TOTAL ASSETS MINUS TOTAL LIABILITIES)

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TOTAL LIABILITIES + NET WORTH.

**PERSONAL INFORMATION - APPLICANT**

BUSINESS OR OCCUPATION

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BUSINESS ADDRESS

---

BUSINESS PHONE

---

PARTNER OR OFFICER IN ANY OTHER VENTURE

---

PERSONAL BANK ACCOUNTS CARRIED AT

---

HAVE YOU EVER TAKEN BANKRUPTCY? EXPLAIN

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**PERSONAL INFORMATION - CO-APPLICANT**

BUSINESS OR OCCUPATION

---

BUSINESS ADDRESS

---

BUSINESS PHONE

---

PARTNER OR OFFICER IN ANY OTHER VENTURE?

---

PERSONAL BANK ACCOUNTS CARRIED AT

---

HAVE YOU EVER TAKEN BANKRUPTCY? EXPLAIN

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CONTINGENT LIABILITIES	APPLICANT		CO-APPLICANT		BRIEF DESCRIPTION
	YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>	
GUARANTOR OR COMAKER ON NOTE(S)	YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>	
DEFENDANT IN ANY LEGAL ACTION	YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>	
LETTERS OF CREDIT	YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>	

THE FEDERAL EQUAL CREDIT OPPORTUNITY ACT PROHIBIT CREDITORS FROM DISCRIMINATING AGAINST APPLICANTS: ON THE BASIS OF RACE, COLOR, RELIGION, NATIONAL ORIGIN, SEX, MARRITAL STATUS, AGE (PROVIDED THAT THE APPLICANT HAS THE CAPACITY TO ENTER INTO A BINDING CONTRACT); BECAUSE ALL OR PART OF THE APPLICANT'S INCOME DERIVES FROM ANY PUBLIC ASSISTANCE PROGRAM, OR BECAUSE THE APPLICANT HAS IN GOOD FAITH EXERCISED ANY RIGHT UNDER THE CONSUMER CREDIT PROTECTION ACT. THE FEDERAL AGENCY THAT ADMINISTERS COMPLIANCE WITH THIS LAW CONCERNING THIS CREDITOR IS THE COMPTROLLER OF THE CURRENCY. CONSUMER AFFAIRS DIVISION, WASHINGTON, O.C. 20219.

### SCHEDULE 1 CASH

NAME OF BANK OR SAVINGS AND LOAN ASSOCIATION	TITLE OF ACCOUNT	TYPE OF ACCOUNT	AMOUNT

### SCHEDULE 2 INVESTMENTS, STOCKS & BONDS

DESCRIPTION	REGISTERED IN NAME OF	NO. SHARES OR PAR	LISTED OR UNLISTED	BOOK VALUE	MARKET VALUE	WHERE PLEDGED

### SCHEDULE 3 ACCOUNTS & NOTES RECEIVABLE

OWED BY	MATURITY	AMOUNT DUE	SECURITY IF ANY

### SCHEDULE 4 REAL ESTATE OWNED

DESCRIPTION AND LOCATION	TITLE IN NAME OF	MARKET VALUE	MORTGAGE LENDER	LOAN BALANCE	MONTHLY PAYMENT

### SCHEDULE 5 NOTES PAYABLE (Non-Real Estate)

OWED TO	AMOUNT	DUE	REPAYMENT SCHEDULE	SECURED

WE CONFIRM THIS FINANCIAL STATEMENT IS GIVEN TO YOU BY ME(US) FOR THE PURPOSE OF OBTAINING CREDIT FROM TIME TO TIME; THAT (WE) HAVE READ THE SAME AND THAT IT IS TRUE AND COMPLETE (WE) AGREE THAT IF, IN YOUR SOLE OPINION, THIS FINANCIAL STATEMENT IS FOUND TO BE INCORRECT, ANY ONE OR MORE OR ALL OF MY(OUR) OBLIGATIONS TO YOU, AT YOUR SOLE DISCRETION, MAY BE MATURED BY YOU WITHOUT DEMAND UPON OR NOTICE TO ME(US)

APPLICANT SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_

CO-APPLICANT SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_

TO APPLICANT(S) - RETAIN A COPY OF THIS STATEMENT FOR YOUR RECORDS