

## Personal Financial Statement

Name(s) \_\_\_\_\_  
 Address \_\_\_\_\_  
 City/St/Zip \_\_\_\_\_  
 How Long at Current Address \_\_\_\_ Yrs \_\_\_\_ Months

Business Address \_\_\_\_\_  
 City/St/Zip \_\_\_\_\_  
 Length of Employment \_\_\_\_\_  
 Res Phone \_\_\_\_\_ Bus Phone \_\_\_\_\_

ASSETS	AMOUNT (\$)	LIABILITIES	AMOUNT (\$)
Cash on hand and in banks (List each bank name and amount; include money market accounts and CDs)	_____	Notes Payable to Banks and Other Financial Institutions (Schedule D)	_____
Readily Marketable Securities (Schedule A)	_____	Secured	_____
Non-Readily Marketable Securities (Schedule A)	_____	Unsecured	_____
Accounts and Notes Receivable	_____	Notes Payable to Others	_____
Net Cash Surrender Value of Life Insurance	_____	Secured	_____
Residential Real Estate	_____	Unsecured	_____
Real Estate Investments (Sch B)	_____	Accounts Payable (inc credit cards)	_____
Partnership/PC Interests (Sch C)	_____	Margin Accounts	_____
Vested Retirement Accounts	_____	Notes Due: Partnership (Schedule C)	_____
Deferred Income (# ____ Years)	_____	Taxes Payable	_____
Personal Property (inc autos)	_____	Mortgage Debt (Schedule B)	_____
_____	_____	Life Insurance Loans	_____
Other Assets (List)	_____	Other Liabilities (List)	_____
_____	_____	_____	_____
TOTAL ASSETS	_____	TOTAL LIABILITIES	_____
		NET WORTH	_____
		TOTAL LIABILITIES AND NET WORTH	_____

**SCHEDULE A - All Securities** (including Money Market Funds)

Description	Owners	# Shares	Where Held	Cost	Current Market Value	Pledged? Y/N
<i>Readily Marketable Securities (including U.S. Government and Municipal) (attach a separate sheet if necessary)</i>						
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
<i>Non-Readily Marketable Securities (including closely held, restricted stock, etc.) (attach a separate sheet if necessary)</i>						
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

**SCHEDULE B - Personal Residence & Real Estate Investments** (majority ownership only)

Property Address	Legal Owner	Yr Purchase Price	Market Value	Loan Balance
<i>Personal Property</i>				
_____	_____	_____	_____	_____
<i>Investment Property</i>				
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**SCHEDULE C - Partnerships** (less than majority ownership for real estate partnerships)

Type of Investment	Date of Init Inv	Cost	% Owned	Current Mkt Value	First Contrib	Balance Due on Partnerships
Notes, Cash Call						
<i>Business/Professional (indicate same)</i>						
_____	_____	_____	_____	_____	_____	_____
<i>Investments (including tax shelters)</i>						
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

**SCHEDULE D - Notes Payable**

Due To - Type of Facility	Secured Y / N	Amt of Line	Int. Rate	Maturity Date	Balance	Collateral
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

The information contained in the statement is provided to induce the Lender to extend or to continue the extension of credit to the undersigned or to others upon the guaranty of the undersigned. The undersigned acknowledge and understand that the Lender is relying on the information provided herein in deciding to grant or continue credit or to accept a guaranty thereof. Each of the undersigned represents, warrants and certifies that the information provided herein is true, correct and complete. Each of the undersigned agrees to notify the Lender immediately and in writing of any change in name, address, or employment and of any material adverse change (1) in any of the information contained in the statement or (2) in the financial condition of any of the undersigned or (3) in the ability of any of the undersigned to perform its (or the) obligations to the Lender. In the absence of such notice or a new and full written statement, this should be considered as a continuing statement and substantially correct. The Lender is authorized to make all inquiries deemed necessary to verify the accuracy of the information contained herein, and to determine the credit-worthiness of the undersigned. Each of the undersigned authorizes the Lender to answer questions about the Lender's credit experience with the undersigned. In addition, the Lender is authorized, both now and in the future, to check the personal credit history of the undersigned.

If you have forwarded this application to us electronically, this will act as your signature and authorization to proceed with our analysis. If you wish to add your electronic signature, please proceed to the non-required signature fields below.

Principal Name: \_\_\_\_\_ Date: \_\_\_\_\_

Principal Signature: \_\_\_\_\_ Title: \_\_\_\_\_

Principal Name: \_\_\_\_\_ Date: \_\_\_\_\_

Principal Signature: \_\_\_\_\_ Title: \_\_\_\_\_

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