

Personal Financial Statement (*Confidential*)

DATE _____

Personal Information

Name _____ Social Security No. _____ Date of Birth _____ Number of Dependents _____

Residence Address _____ City/State/Zip _____

Residence Phone _____ Business Phone _____

Business Organization _____ Partner or officer in any other business _____

Assets

Cash on hand and in Banks _____

Accounts Receivable _____

Notes Receivable _____

Stocks and Bonds (see Schedule A) _____

Real Estate (see Schedule B) _____

Cash value of Life Insurance(see Schedule C) _____

Automobiles _____

Dental Practice _____

Dental Assets _____

Household Goods Other Assets (itemize): _____

Other Assets (itemize) _____

Total Assets: \$ _____

Liabilities

Education Loan _____

Notes Payable — Secured _____

To Banks — Unsecured _____

Notes Payable to others _____

Accounts Payable _____

Unpaid Taxes _____

Mortgages on Real Estate (see schedule B) _____

Other Debts (itemize): _____

Total Liabilities \$ _____

Net Worth \$ _____

Total Liabilities and Net Worth \$ _____

Source of Annual Income

Salary _____

Bonus and Commissions _____

Dividends _____

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.
Other income (itemize)

Total \$ _____

General Information

Contingent Liabilities —as endorser or co-maker _____

Unsatisfied judgments or lawsuits pending _____

If so, what do you estimate as the additional amount you may be requested to pay? _____

Are you obligated to pay alimony, child support, or separate maintenance payments? _____

Are any assets pledged or in joint names other than as described on Schedules? _____

Have you ever been declared bankrupt? _____

Do you have a will? _____

Who is named as your executor? _____

Schedule A — Stocks and Bonds

No. of Shares _____

Face Value Bonds	Description (includes maturity on Bonds)	Are These Pledged?	Market Value
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Schedule B — Real Estate

Address and Type Type of Property	Title in Name of	% of Ownership	Date Acquired	Cost	Market Value	Mortgage Maturity	Mortgage Amount
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____

Schedule C — Life Insurance

Name of Ins. Comp	Owner of Policy	Beneficiary	Face Amount	Policy Loans	Cash Surrender Value
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Schedule D — Deposit Accounts and Credit with Financial Institutions

(Banks, Savings and Loan Associations, and Credit Unions)

Name & Address Of Institution	Account or Credit in Name of:	Account Balance	Cash	Orig. Loan Date	Secured or Unsecured	Original Date	Maturity Date	Current Loan Balance:
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____

The information contained in this statement is provided for the purpose of obtaining, or maintaining credit with you for the undersigned, or persons, firms, or corporations in whose behalf the undersigned may either severally or jointly with others, execute a guaranty in your favor. I (we) understand that you are relying on this information (including the designation made as to ownership of property) in deciding to grant or continue credit. I (we) represent and warrant that the information provided is true **and complete**. You may consider this statement to be true and correct until I (we) notify you in writing of a change. You are authorized to make all inquiries you consider necessary to verify the accuracy of these statements and to determine my (our) creditworthiness. You are authorized to answer questions about your credit experience with me (us).

SIGNATURE (Individual) _____

SIGNATURE (Other Party) _____

Date

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