



Personal Financial Statement

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As of (date)

Prepared for (loan / property, if known)

APPLICANT INFORMATION

Full Legal Name

Co-Applicant Name (if applicable)

Social Security Number / Tax ID

Date of Birth

Co-Applicant SSN / Tax ID

Home Address

City / State / ZIP

Home Phone

Email

Business Name

Business Phone

Business Address

ASSETS & LIABILITIES

ASSETS

Cash on hand & in banks

Savings accounts

IRA / retirement accounts

Accounts & notes receivable

Life insurance - cash surrender value

Stocks and bonds

Real estate owned

Automobile(s)

Personal property

Other assets

TOTAL ASSETS

LIABILITIES

Accounts payable

Notes payable - banks & others

Installment (auto) - balance

Installment (other) - balance

Loans on life insurance

Mortgages on real estate

Unpaid taxes

Other liabilities

TOTAL LIABILITIES

NET WORTH



Personal Financial Statement

SOURCES OF ANNUAL INCOME

Salary

Net investment income

Real estate income

Other income (describe below)

Description of other income

CONTINGENT LIABILITIES

As endorser or co-maker

Legal claims & judgments

Provision for federal income tax

Other special debt

SCHEDULE OF REAL ESTATE OWNED

Property Address	Type	Date Acq.	Cost	Mkt. Value	Mortgage Bal.	Monthly Pmt.	Status



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NOTES PAYABLE TO BANKS AND OTHERS

Name & Address of Noteholder	Original Balance	Current Balance	Payment / Frequency	How Secured / Endorsed

STOCKS AND BONDS

Number of Shares	Name of Securities	Cost	Market Value	Quotation / Exchange	Date of Quotation

LIFE INSURANCE HELD (BENEFICIARY & AMOUNT)

Insurance Company	Face Amount of Policy	Beneficiary

Applicant Signature	Date

Co-Applicant Signature	Date