



## PERSONAL FINANCIAL STATEMENT

## INDIVIDUAL FINANCIAL STATEMENT

Name: Date: Names Of Other Person(S) And Entity(les): Address: CHECK AS APPLICABLE ☐ Individually, without a co-signer, or guaranty of a relative or other person(s) or entity. Note: Applicants, if married, may apply for a separate account.Applicant is applying  
for this loan:☐ Jointly, with the co-signature or guaranty of one or more person or entities (including any existing guarantors).

## THIS SECTION AUTO POPULATES FROM PAGE 2, 3 &amp; 4.

ASSETS		AMOUNT	LIABILITIES		AMOUNT
Cash	<b>SCHEDULE A</b>		Notes & Loans Payable	<b>SCHEDULE G</b>	
	Bank Accounts			Notes Payable to Banks	
Stocks & Bonds	<b>SCHEDULE B</b>		Accounts & Bills Payable	<b>SCHEDULE H</b>	
Tax	Tax Refund Due		Taxes Owed		
Insurance	<b>SCHEDULE C</b>		Other Liabilities	<b>SCHEDULE I</b>	
	Cash Value				
Accounts & Notes Receivable	<b>SCHEDULE D</b>				
Real Estate	<b>SCHEDULE E</b>		Real Estate Notes & Contracts Payable	<b>SCHEDULE J</b>	
	Residence(s)			Residence (s)	
	Income Property(ies)			Income Property (ies)	
Other Assets	<b>SCHEDULE F</b>		Contingent Liabilities		
	Other Assets & Personal Property				
	<b>TOTAL ASSETS \$</b>		<b>TOTAL LIABILITIES \$</b>		
			<b>NET WORTH</b> (DIFFERENCE BETWEEN TOTAL ASSETS & TOTAL LIABILITIES)		

## RECAP OF INCOME AND EXPENSES

\*See notice below before completing Other Income

ANNUAL INCOME FOR YEAR:		ANNUAL EXPENSES FOR YEAR:		CONTINGENT LIABILITIES:	
Salary or Wages		Property Tax & Assessments		As Endorser on Notes / Contracts	
Dividends or Interest		Fed. & State Income Tax		As Guarantor on Notes / Contracts	
Rentals (Gross Income)		Real Estate Loan Payments		For Taxes	
Business (Net Income)		Payments on Contracts / Notes		Other (Describe)	
Other Income (Describe)*		Estimated Living Expenses			
		Other			
TOTAL INCOME \$		TOTAL EXPENSES \$		TOTAL \$	

\*Alimony, child support, or separate maintenance payment income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation

## SCHEDULE A

### CASH LOCATION AND STATUS OF BANK ACCOUNTS

CKNG	CD	SVNG	Bank and Branch Where Carried	Balance	Is this Account Pledged for a Loan?	Loan Balance	Loan Maturity Date
			<b>Total Balance</b>		<b>Total Loan Balance</b>		

## SCHEDULE B

### STOCKS AND BONDS (Include Interests in Any Closely Held Business)

Description	No. Shares	Registered in Name Of	Source of Valuation	Date	Price Per Share	Total Value	Purchase of Margin or Pledged
					<b>Total</b>		

## SCHEDULE C

### LIFE INSURANCE

Insured	Primary Beneficiary	Face Amount	Actual Cash Value	Loans on Policy	Name of Company
		<b>Totals</b>			

**SCHEDULE D****ACCOUNTS AND NOTES RECEIVABLE**

Owner(s)	Due From	Collateral	Maturity Date	Monthly Payment	Balance Due
				<b>Totals</b>	

**SCHEDULE E****REAL ESTATE (Show Mortgage Information in Schedule J)**

Parcel No.	Description	Address / Location	Owner(s)	Date Acquired	Cost	Present Value
Prim. Res.						
1						
2						
3						
4						
5						
6						
7						
8						

**SCHEDULE F****OTHER ASSETS AND PERSONAL PROPERTY**

Automobile (Yr./Make)	Value	Rec. Vehicles and Boats (Yr./Make/Ft.)	Value	Personal Property	Value		Totals
						Subtotal - Autos	
						Subtotal - R/V's	
						Subtotal - Personal Property	
<b>Subtotals - Autos</b>		<b>Subtotals - R/V's</b>		<b>Subtotals - Personal Property</b>		<b>Total - All Other Assets</b>	

**SCHEDULE G****NOTES AND LOANS PAYABLE TO BANKS AND OTHERS**

Payable To	Collateral	Person(s) Liable	Maturity Date	Monthly Payment	Balance Due
			<b>Totals</b>		

**SCHEDULE H****ACCOUNTS AND BILLS PAYABLE (Including Bank Cards)**

Payable To	Person(s) Liable	Monthly Payment	Balance Due
		<b>Totals</b>	

**SCHEDULE I****OTHER LIABILITIES**

Payable To	Person(s) Liable	Collateral	Monthly Payment	Balance Due
			<b>Totals</b>	

**SCHEDULE J****NOTES and CONTRACTS PAYABLE**  
(Include Mortgages on Property Listed in Schedule E)

Parcel No.	Mortgage or Lienholder	Annual Taxes	Monthly Income	Monthly Payments	Balance Due
Prim Res.					
1					
2					
3					
4					
5					
6					
7					
8					
	<b>Totals</b>				

\_\_\_\_\_  
Signature\_\_\_\_\_  
Signature\_\_\_\_\_  
Date\_\_\_\_\_  
Date

## COMMENTS