

PERSONAL FINANCIAL STATEMENT

Financial statement of _____
Name

Street Address City State Zip Code

Applicant's Social Security Number _____ Spouse's Social Security Number _____

FINANCIAL CONDITION AS OF _____, 20_____.

ASSETS	AMOUNT(S)	LIABILITIES	AMOUNT(S)
CASH ON HAND Cash in following Banks _____		NOTES PAYABLE TO BANKS Auto (Combined)	
		Credit Cards (Combined).....	
STOCKS AND BONDS Schedule 1		REAL ESTATE LOANS Schedule 4	
ACCOUNT AND NOTES RECEIVABLE Schedule 2		OTHER LIABILITIES Other (itemize)	
Schedule 3		_____	
REAL ESTATE Schedule 4		_____	
OTHER PERSONAL PROPERTY Automobile Schedule 5.....		_____	
Other.....		_____	
LIFE INSURANCE Schedule 6.....			
TOTAL ASSETS		TOTAL LIABILITIES	
		• NET WORTH	

• **TOTAL ASSETS – TOTAL LIABILITIES = NET WORTH**

1. STOCKS AND BONDS

Name of Security	No. Shares	If any pledged, State to Whom and for What Purpose	Dividends Paid Last Two Years	Market Value
TOTAL				

2. ACCOUNTS RECEIVABLE

Name and address from Whom Due	For What is Due	When Sold	When Due	Amount
TOTAL				

3. NOTES RECEIVABLE

Name and address from Whom Due	For What is Due	When Sold	When Due	Amount
TOTAL				

4. REAL ESTATE

Description of Property	Title in Name Of	Market Value	Cost	Amount Encumbrance	Monthly Payments	Monthly Income
TOTAL						

5. OTHER PERSONAL PROPERTY

Description of Property	Age of Item	Market Value	Cost	Encumbrance	Monthly Payment
TOTAL					

6. LIFE INSURANCE – CASH VALUE

Name of Company	Policy Number	Name of Insured	Beneficiary	Face Value	Cash Value	Amount Borrowed
TOTAL						