

Personal Financial Statement

Name	Date of Birth	Social Security #	Driver's Lic #	<input type="checkbox"/> Married <input type="checkbox"/> Unmarried <input type="checkbox"/> Separated
Street Address	City and State	Zip	Phone #	How Long
		<input type="checkbox"/> Own Home	<input type="checkbox"/> Renting	Monthly Pmt. \$ _____
		<input type="checkbox"/> Buying	<input type="checkbox"/> Other	
Name and Address of Employer		Position	Length of Emp.	Bus. Phone
Ages of Dependents				
Co-Applicant/Spouse Name		Date of Birth	Social Security #	Driver's Lic #
Name and Address of Employer		Position	Length of Emp.	Bus. Phone

Financial Information as of _____

ASSETS	AMOUNT	LIABILITIES	AMOUNT	MONTHLY PAYMENT	
Cash in Banks		Due to Others			
Cash in other institutions (detail)		Income taxes and Other taxes payable			
Securities owned (Schedule 1)		Revolving Credit (Schedule 4)			
Notes Receivable including mortgages & Deeds of Trust Owned (Schedule 2)		Installment contracts and notes payable to banks & others (Schedule 5)			
IRA/Keogh/Pension		Loans on Life insurance			
Real Estate Owned (Schedule 3)		Mortgages or Liens on Real Estate (Schedule 3)			
Other Investments (Partnerships, etc.)		Other Liabilities (detail)			
Automobiles					
Cash Surrender Value of Life Insurance		Total Liabilities/Payments			
Personal Property and Other Assets (detail)		NET WORTH			
TOTAL ASSETS		TOTAL LIABILITIES & NET WORTH			
ANNUAL INCOME	AMOUNT	ANNUAL EXPENDITURES	AMOUNT	CONTINGENT LIABILITIES	AMOUNT
Applicant Salary		Interest		As Endorser	
Co-Applicant/Spousal Salary		Property Tax/Assessments		As Guarantor	
Dividends/Bonds		Income and other taxes		On Damage Claims	
Interest		Mortgage Payments		Letters of Credit	
Rentals		Other Contract Payments		Other (detail)	
Other (detail)		Rent			
If you are married and live in a community property state, your earnings, your spouse's earnings and all "other income" are presumed to be community property unless you indicate otherwise.		Insurance			
		Alimony, Child Sup/Maint.			
		Personal Expenses			
		Other (detail)			
TOTAL		TOTAL		Check here if "none"	
		TOTAL		TOTAL	

GENERAL INFORMATION - if married these questions apply to both you and your spouse:

- | | | |
|---|------------------------------|-----------------------------|
| Are any assets held in Trust? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Are any assets pledged or debts secured except as shown? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Have you ever had a repossession? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Have you ever had a bankruptcy or had a judgment against you? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Have you ever been a principal or guarantor of a firm that declared bankruptcy? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Are you party to any claim or suits? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Has there been an IRS audit in the past 3 years? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| If yes, has the audit been settled? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
- If yes to any of the above, please explain on a separate sheet.

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SCHEDULE 1: MARKETABLE SECURITIES:

Are any of your securities restricted? Yes No Do you own 10% or more of the outstanding shares of any company? Yes No

HOW HELD	NO. SHARES OR BOND AMOUNT	DESCRIPTION	TITLE IN NAME OF	PLEGDED YES OR NO	WHERE TRADED	PRESENT MARKET VALUE

↑Indicate: J-Jointly with spouse O-Jointly with other than spouse TOTAL **P** \$ _____
 A-Applicant's separate property S-Spouse's separate property

SCHEDULE 2: NOTES RECEIVABLE-MORTGAGE & DEED OF TRUST OWNED

HOW HELD	NAME OF DEBTOR	COLLATERAL/TYPE OF PROPERTY	DATE OF NOTE	ANNUAL P & I PAYMENT	1ST OR 2ND LIEN	UNPAID BALANCE

↑Indicate: J-Jointly with spouse O-Jointly with other than spouse TOTAL **P** \$ _____
 A-Applicant's separate property S-Spouse's separate property

SCHEDULE 3: REAL ESTATE HOLDINGS - MORTGAGES OR LIENS

↓ Indicate: SD=Single Dwelling; MD=Multiple Dwelling; or C=Commercial/Industrial

HOW HELD	PROPERTY ADDRESS	a. Market Value	Date Purchased	NAME OF LENDERS	a. 1st TD Bal.	Monthly Payment
		b. Cost	% Owned		b. 2nd TD Bal.	
		a.			a.	
		b.			b.	
		a.			a.	
		b.			b.	
		a.			a.	
		b.			b.	
		a.			a.	
		b.			b.	
TOTAL P				TOTAL P		

TOTAL **P** \$ _____

SCHEDULE 4: REVOLVING CREDIT

SCHEDULE 5: INSTALLMENT CONTRACTS AND NOTES PAYABLE

CREDITOR'S NAME	ACCOUNT NUMBER	MONTHLY PAYMENT	PRESENT BALANCE	CREDITOR'S NAME	ACCOUNT NUMBER	MONTHLY PAYMENT	PRESENT BALANCE
TOTAL P		\$	\$	TOTAL P		\$	\$

X _____ Date _____ X _____ Date _____

Applicant's Signature _____
 _____ Date _____
 (Optional) Signature of Spouse/Former Spouse

Co-Applicant's Signature
 If this is to be a joint account (Your spouse does not have to sign as a co-applicant if this is to be your separate account).

To authorize verification of income and of credit history only, your signature or former spouse's authorization may be needed if you are relying on other income or other community property.