

Personal Financial Statement Submitted To:



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Section 1 - Individual Information

APPLICANT		CO-APPLICANT	
Name:		Name:	
Home Address:		Home Address:	
City, State, Zip:		City, State, Zip:	
Phone:		Phone:	
Social Security No.:		Social Security No.:	
Date of Birth:		Date of Birth:	
E-Mail Address:		E-Mail Address:	
Employer name:		Employer name:	
Position/Title:	No. of years	Position/Title:	No. of years
Business Address:		Business Address:	
City, State, Zip:		City, State, Zip:	
Business Phone:	Fax:	Business Phone:	Fax:

Section 2 - Professional Contacts

ACCOUNTANT	ATTORNEY	INSURANCE AGENT
Name:	Name:	Name:
Phone:	Phone:	Phone:

Section 3 - Statement of Financial Condition as of: _____ (date)

GROSS ANNUAL INCOME			GROSS ANNUAL EXPENSES		
	APPLICANT	CO-APPLICANT	Combine annual expenses of both Applicant & Co-Applicant		
Base Salary			Primary Residence	1st. mortgage(P & I)	
Overtime				Property Taxes	
Bonuses			Second Mortgage (if any)	(P & I)	
Commissions			Investment or	1st Mortgage (P & I)	
Dividends			Vacation Properties	Property Taxes	
Interest			Second Mortgage (if any)	(P & I)	
Net Rental Income			Rent Payments / Assessments / HOA		
Capital Gains			Homeowners Insurance		
Partnership Income			Other Insurance		
Other**			Other Loans (P & I)		
Other			Investment Expense		
Other			Federal/State Income & Other Taxes		
Other			Credit Cards		
Total Individual			Other*		
Grand Total			Grand Total		

* Other expenses may include tuition, medical expenses, other living expenses and alimony or child support.

**Alimony/Child support or separate maintenance income need not be revealed if the applicant or co-applicant does not choose to have it considered as a basis for repaying the loan.

Section 7 - Schedules

Schedule A

Securities - Government & Marketable Securities

No. of shares	Description	In Name of	Where Held	Cost	Market Value	Pledged? Y/N

Securities - Non-Marketable

No. of shares	Description	In Name of	Where Held	Cost	Market Value	Pledged? Y/N

Schedule B

Real Estate

Personal Residence

Property Address	Title in Name Of	Acquired Date	Acquired Cost	Current Value	Current Mortgage	Mortgage Maturity	Interest Rate	Monthly Payment	Name of Lender

Investment/Vacation Property

Property Address	Title in Name Of	Acquired Date	Acquired Cost	Current Value	Current Mortgage	Mortgage Maturity	Interest Rate	Monthly Payment	Name of Lender

Schedule C

Life Insurance

Name of Insurance Company	Owner of Policy	Policy Beneficiary	Policy Type	Face Value	Net Cash Value	Loans Against Policy

Schedule D

Partnerships/Corporations/LLCs

Type of Investment	Name of Investment	Acquired		Percent Owned	Current Market Value	Balance Due on notes	Date of Final Contribution
		Date	Cost				

Use additional sheets as necessary

For on-line users, additional schedules are attached as page 6

Additional Schedules

Schedule A

Securities - Government & Marketable Securities

No. of shares	Description	In Name of	Where Held	Cost	Market Value	Pledged Y/N

Securities - Non-Marketable

No. of shares	Description	In Name of	Where Held	Cost	Market Value	Pledged Y/N

Schedule B

Real Estate

Investment/Vacation Property

Property Address	Title in Name Of	Acquired Date	Cost	Current Value	Current Mortgage	Mortgage Maturity	Interest Rate	Monthly Payment	Name of Lender

Schedule C

Life Insurance

Name of Insurance Company	Owner of Policy	Policy Beneficiary	Policy Type	Face Value	Net Cash Value	Loans Against Policy

Schedule D

Partnerships/Corporation/LLCs

Type of Investment	Name of Investment	Acquired		Percent Owned	Current Market Value	Balance Due on notes	Date of Final Contribution
		Date	Cost				

Schedule E

Notes Payable

Payable to	Type	Original Balance	Current Balance	Collateral	Interest Rate	Maturity