



**CONFIDENTIAL PERSONAL FINANCIAL STATEMENT**

|                     |        |      |        |
|---------------------|--------|------|--------|
| Full Legal Name(s): |        |      |        |
| Home Address:       |        |      |        |
| City:               | State: | Zip: | Phone: |

**STATEMENT OF FINANCIAL CONDITION**

| <b>ASSETS</b>                                          | <b>In Dollars</b> | <b>LIABILITIES</b>                                           | <b>In Dollars</b> |
|--------------------------------------------------------|-------------------|--------------------------------------------------------------|-------------------|
| Cash on Hand and in Banks                              |                   | Notes Payable to Banks                                       |                   |
| US Government & Marketable Securities - See Schedule A |                   | Amounts Payable to Others                                    |                   |
| Privately Held Businesses - See Schedule B             |                   | Credit Cards Payable                                         |                   |
| Cash Value - Whole Life Insurance (Not Death Benefit)  |                   | Amounts Payable to Others-Secured                            |                   |
| Loans Receivable                                       |                   | Real Estate Mortgages Payable - See Schedule C (Amount Owed) |                   |
| Automobiles                                            |                   | Unpaid Taxes and Interest                                    |                   |
| Real Estate Value Totals (See Schedule C)              |                   | Other Debts - Itemized                                       |                   |
| Personal Property Total (Itemized Below)               |                   |                                                              |                   |
|                                                        |                   |                                                              |                   |
|                                                        |                   |                                                              |                   |
|                                                        |                   |                                                              |                   |
|                                                        |                   |                                                              |                   |
|                                                        |                   | <b>TOTAL LIABILITIES</b>                                     |                   |
|                                                        |                   | <b>NET WORTH</b>                                             |                   |
| <b>TOTAL ASSETS</b>                                    |                   | <b>TOTAL LIABILITIES + NET WORTH</b>                         |                   |

**SCHEDULE A - US GOVERNMENT AND MARKETABLE SECURITIES**

| Number of Shares | Description | In Name Of | Are These Pledged? | Market Value |
|------------------|-------------|------------|--------------------|--------------|
|                  |             |            |                    |              |
|                  |             |            |                    |              |
|                  |             |            |                    |              |

**SCHEDULE B - PRIVATELY HELD BUSINESSES**

| Number of Shares | Description | In Name Of | Are These Pledged? | Source of Value | Market Value |
|------------------|-------------|------------|--------------------|-----------------|--------------|
|                  |             |            |                    |                 |              |
|                  |             |            |                    |                 |              |
|                  |             |            |                    |                 |              |

**SCHEDULE C - REAL ESTATE OWNED**

| Title in the Name Of | Address of Property | % of Ownership | Date Acquired | Purchase Price | Market Value | Mortgage Maturity | Amount Owed |
|----------------------|---------------------|----------------|---------------|----------------|--------------|-------------------|-------------|
|                      |                     |                |               |                |              |                   |             |
|                      |                     |                |               |                |              |                   |             |
|                      |                     |                |               |                |              |                   |             |

The information contained in this statement is provided for the purpose of obtaining or maintaining credit with you on behalf of the undersigned, or persons, firms or corporation in whose behalf the undersigned may either severally or jointly with others, execute a guaranty in your favor. Each undersigned understands that you are relying on the information provided herein (including the designation made as to ownership of property) in deciding to grant or continue credit. Each undersigned represents and warrants that the information provided is true and complete and that you may consider this statement as continuing to be true and correct until a written notice of a change is given to you by the undersigned. You are authorized to make all inquiries you deem necessary to verify the accuracy of the statements made herein, and to determine my / our credit worthiness. You are authorized to answer questions about your credit experience with me / us.

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_ **SSN:** \_\_\_\_\_  
**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_ **SSN:** \_\_\_\_\_