

# Personal Financial Statement

<b>1<sup>st</sup> Applicant:</b>
<b>Address:</b>

<b>2<sup>nd</sup> Applicant:</b>
<b>Address:</b>

(I,We) make the following statement of all (my, our) assets and liabilities as of the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, and give other material information for the purpose of obtaining credit with you on notes and bills bearing (my, our signature, endorsement or guarantee, and agree to notify you promptly on any change affecting (my, our) ability to pay.

<b>Assets Solely Owned</b> <small>(List below only those assets <i>not</i> jointly owned.)</small>		<b>All Liabilities and Net Worth</b> <small>(List below all liabilities, joint or otherwise.)</small>	
Cash (See Sched.1)	\$	Notes Payable to Banks	\$
Accounts and Loans Receivable (See Sched.2)	\$	Notes Payable to Others	\$
Life Insurance – Cash Value (See Sched.2)	\$	Loans	\$
Real Estate (See Sched.5)	\$	Mortgages Payable on Real Estate	\$
Automobiles	\$	Accounts Payable	\$
Other Assets Itemize:	\$	Other Taxes and Assessments Payable	\$
		Other Liabilities	\$
		<b>TOTAL Liabilities</b>	\$
		<b>Net Worth</b>	\$
<b>TOTAL Assets Solely Owned</b>	\$	<b>TOTAL of all Liabilities and Net Worth</b>	\$

<b>Jointly Owned Assets</b> <small>(Summarize below, itemize in Schedule 5.)</small>		<b>Source of Income</b> <small>(You need not disclose income from alimony, child support or maintenance payments, unless you wish it to be considered as income.)</small>	
Cash	\$	Salary	\$
Accounts, Mortgages, and Loans Receivable	\$	Bonus and Commissions	\$
Stocks and Bonds	\$	Dividends	\$
Real Estate	\$	Real Estate Income	\$
Other Assets (Itemize):	\$	Other Income (Itemize):	\$
		<b>TOTAL Income</b>	\$

		<b>Personal Information</b>	
		Business/Occupation:	
		Age:	
<b>TOTAL Jointly Owned Assets</b>		Partner/Office in any venture?	
<b>TOTAL of All Assets (Solely and Jointly Owned)</b>		No. of Dependents?	

Have you ever taken bankruptcy, made a composition settlement, or are you a defendant in any legal action? If so, explain:

Do you have any contingent liabilities personally or as co-maker, on leases or contracts, or Federal Income Tax Liability? If so explain:

Do you have a will? Yes No Who is named as your executor?

<b>No. 1 Banking Relations (A list of all bank accounts including savings, not jointly owned, and all loans, joint or otherwise.)</b>				
Name & Location of Bank	Cash Balance	Amount of Loan	Maturity of Loan	How Endorsed Guaranteed or Secured

**Personal Financial Statement (Continued)**

<b>No. 2 Accounts, Loans and Notes Receivable (A list of the largest amounts, owing to me.)</b>							
Name and Address of Debtor	Amount Owing	Age of Debt	Description or Nature of Debt	Description of Security Held	Date Payment Expected		
<b>No. 3 Life Insurance (Attach schedule if necessary.)</b>							
Owner of Policy	Name of Beneficiary	Name of Insurance Co.	Face of Policy	Total Cash Surrender Value	Total Loans on Policy	Policy Assigned?	
<b>No. 4 Stocks and Bonds (Attach schedule if necessary.)</b>							
Face Value of No. of Shares	Description of Security	Registered in Name of	Original Cost	Present Market Value	To Whom Pledged		
<b>No. 5 Real Estate (Attach schedule if necessary.)</b>							
Description or Street No.	Title in Name of	Mortgages or Liens	Amount Payments	Original Cost	Assessed Value	Present Market Value	All taxes Current?
<b>No. 6 Jointly Owned Property – Details of summary on front page. (Attach schedule if necessary.)</b>							
Assets		Value	Name of Joint Tenant				
		\$					
		\$					
		\$					
		\$					
		\$					
		\$					
		\$					

Applicant(s) hereby certifies that the information contained in this application is true and correct and authorize the landlord or any agent of the landlord acting on his/her behalf to make any inquiries deemed necessary to evaluate the application including, credit and public record information. I hereby release and hold harmless any person, firm or entity that discloses matters in accordance with this authorization, I hereby authorize, release and hold harmless any person, firm or entity to verify information associated with this application. I also understand that incomplete, inaccurate or falsified information shall be grounds for denial of application or subsequent termination of tenancy upon determination of such falsified information.

Signed: \_\_\_\_\_ Soc. Security #: \_\_\_\_\_ DOB: \_\_\_\_\_

Witness: \_\_\_\_\_

Signed: \_\_\_\_\_ Soc. Security #: \_\_\_\_\_ DOB: \_\_\_\_\_

Witness: \_\_\_\_\_