



Personal Financial Statement

Financial Condition as of: _____

A complete and signed Personal Financial Statement is required from each individual applicant or guarantor. Co-applicants or co-guarantors with joint assets and liabilities can be included on one joint statement. However, if any assets or liabilities are not joint, a separate statement is required from each individual, even if the co-applicant/co-guarantor is a spouse/domestic partner.

Section 1 – Applicant / Guarantor

Name _____ Social Security No. _____
Date of Birth _____ No. Dependents _____ Ages _____
Home Address _____
Present Employer _____ Business/Occupation _____
Employer Address _____ Years There _____ Position _____
Business Phone _____ Home Phone _____
Email Address: _____

Section 2 – Co-Applicant / Co-Guarantor

Name _____ Social Security No. _____
Date of Birth _____ No. Dependents _____ Ages _____
Home Address _____
Present Employer _____ Business/Occupation _____
Employer Address _____ Years There _____ Position _____
Business Phone _____ Home Phone _____
Email Address: _____

Schedule 2 Non-Marketable Securities (Not Publicly Traded)

Number of Shares or Face Value (Bonds)	Description	In Name Of	Are These Pledged?	Market Value

Schedule 3 Primary Residence and Real Estate Owned

Address and Type of Property	Title in Name of	% Of Ownership	Monthly Rental Income	Cost / Year Acquired	Present Market Value	Unpaid Mortgage Balance	To Whom Mortgage Payable	Monthly Mortgage Payment

Schedule 4 Limited Partnership Investments

Name Of Partnership	Type Of Investment	% Of Ownership	Date Acquired	Total Investment	Annual Cash Flow	Letter Of Credit Or Note Due

Schedule 5 Notes Payable

To Whom	Address	Name Of Debtor	Collateral	Interest Rate	Maturity Date	Unpaid Balance

Schedule 6 Life Insurance

Name Of Insurance Company	Owner Of Policy	Beneficiary	Face Amount	Policy Loans	Cash Surrender

