



Personal Financial Statement

PERSONAL INFORMATION
Applicant Name, SSN, Residence Address, City, State Zip, Phone Number, DOB
Co-Applicant Name, SSN, Residence Address, City, State Zip, Phone Number, DOB

ASSETS: Only assets titled directly in the name(s) above should be listed. Please show the dollar value of your interest in assets shared with others under "Other Investments" or "Other Assets." Contingent (indirect) assets (i.e. trusts, vested pension benefits, etc.) may be listed in the space provided below.
LIABILITIES: List all direct liabilities. Please show those joint with others under "Other Liabilities" noting the percentage and dollar amount for which you could be liable. Contingent (indirect) liabilities should be listed in the space provided below.

STATEMENT OF ASSETS AND LIABILITIES as of _____, 20_____.

Table with 2 columns: ASSETS, IN DOLLARS. Rows include Cash on Hand & in Banks, US Gov't Marketable Securities, Retirement Funds, Restricted or control stock, Partial Interest in Real Estate Equities, Real Estate Owned, Loans Receivable, Automobiles, Other Personal Property, Cash Value-Life Insurance, Other Assets, and TOTAL ASSETS.

Table with 2 columns: LIABILITIES, IN DOLLARS. Rows include Notes Payable to Banks (Secured/Unsecured), Real Estate Mortgages Payable, Amounts payable to others (Secured/Unsecured), Due to Brokers, Accounts and Bills Due, Unpaid Income Tax, Other Unpaid Taxes and Interest, Other Debits-Itemize, TOTAL LIABILITIES, NET WORTH (Total Assets minus Total Liabilities), and TOTAL LIABILITIES AND NET WORTH.

*Specify Cost or Market Value applicable. Please do not include leased items.

STATEMENT OF INCOME AND EXPENDITURES

12-month period ending on the _____ day _____, 20_____

Income from alimony, child support, or separate maintenance income need not be revealed if the applicant or co-applicant does not wish to have it considered as a basis for repaying this obligation.

Table with 2 columns: ANNUAL INCOME, AMOUNT. Rows include Salary (Applicant), Salary (Co-Applicant), Bonuses & Commissions, Bonuses & Commissions (Co-Applicant), Rental Income, Other Income: (List), and TOTAL INCOME.

Table with 2 columns: ANNUAL EXPENDITURES, AMOUNT. Rows include Federal Income & Other Taxes, State Income & Other Taxes, Rental Payments, Co-op or Condo Maintenance, Mortgage Payment, Property Taxes, Interest & Principal Payments on Loans, Other Expenses: (List), and TOTAL EXPENDITURES.

(USE ADDITIONAL SCHEDULES, IF NECESSARY)