

PERSONAL FINANCIAL STATEMENT

I may apply for a credit extension, loan or other financial accommodation alone or together with someone else, ("co-applicant"). If I apply with a co-applicant and our combined assets and debts can meaningfully and fairly be presented together, the co-applicant and I may complete this required statement and any supporting schedules jointly, otherwise separate forms and schedules are required.

APPLICANT			CO-APPLICANT		
Full Name			Full Name		
Street Address			Street Address		
City/State/Zip			City/State/Zip		
County			County		
Since	Own	Rent	Since	Own	Rent
Previous Address (If less than 5 years at present)			Previous Address (If less than 5 years at present)		
City/State/Zip			City/State/Zip		
Since	Owned	Rented	Since	Owned	Rented
Social Security #	Date of Birth		Social Security #	Date of Birth	
Phone:	Residence	Work	Phone:	Residence	Work
Employer			Employer		
Address			Address		
Position/Title		Since	Position/Title		Since
Previous Employer			Previous Employer		
Position/Title		How Long	Position/Title		How Long
Dependents/Include Self			Dependents/Include Self		
Marital Status*			Marital Status*		
<input type="checkbox"/> Unmarried <input type="checkbox"/> Married <input type="checkbox"/> Separated			<input type="checkbox"/> Unmarried <input type="checkbox"/> Married <input type="checkbox"/> Separated		

*Do not provide this information if your application is for individual.

Please Complete Schedules 1-8 before this section.

Date of Valuation:

ASSETS		LIABILITIES	
Cash (Schedule 1):	\$ -	Short Term Notes Due Financial Institutions (Schedule 7)	\$ -
Securities (Schedule 2)	\$ -	Short Term Notes Due to Others (Schedule 7)	\$ -
Life Insurance Cash Value (Schedule 3)	\$ -	Credit Accounts and Bills Due (Schedule 8)	\$ -
Mortgages and Contracts Held by You (Schedule 4)	\$ -	Insurance Loans (Schedule 3)	\$ -
Homestead (Schedule 5)	\$ -	Installment Loans and Contracts (Schedule 7)	\$ -
Other Real Estate (Schedule 5)	\$ -	Mortgages on Home (Schedule 5)	\$ -
Profit Sharing & Pension (Schedule 6)	\$ -	Mortgages on Other Real Estate (Schedule 5)	\$ -
Retirement Accounts, Include IRA Accounts (Schedule 1)	\$ -	Taxes	
Automobiles (Describe)		Other Liabilities (Describe)	
Value of My Companies			
Personal Property			
Other Assets (Describe)			
		Total \$	\$ -
Total \$	\$	(Total Assets Less Total Liabilities)	Net Worth \$

Personal Financial Statement Guide

RJ Alexander



Personal Financial Statement Guide:

Personal Financial Statements Guide American Institute of Certified Public Accountants. Personal Financial Statements Task Force, 2007 **Accountants' Handbook, Special Industries and Special Topics** D. R. Carmichael, Paul H. Rosenfield, 2003-05-13 The premier accounting reference revised and expanded The Accountants Handbook series has the longest tradition of any reference of providing comprehensive coverage of the field to both accounting professionals and professionals in other fields who need or desire quick understandable and thorough exposure to complex accounting related subjects Like its predecessors the Tenth Edition is designed as a single reference source that provides answers to all reasonable questions on accounting and financial reporting asked by accountants auditors bankers lawyers financial analysts and other preparers and users of accounting information Written by nationally recognized accounting professionals including partners in major public accounting firms financial executives financial analysts and other relevant business professionals the Handbook covers both financial accounting and reporting and industry specific accounting issues in separate volumes for easy reference Its comprehensive content provides analysis on over 43 critical areas of accounting **Guide: Preparation, Compilation, and Review Engagements, 2017** AICPA, 2017-12-11 Issued under the authority of Accounting and Review Services Committee ARSC and a go to guide for accountants performing preparation compilation and review engagements this version contains the most up to date guidance including the recently issued Statement on Standards for Accounting and Review Services SSARS No 22 Compilation of Pro Forma Financial Information and SSARS No 23 Omnibus Statement on Standards for Accounting and Review Services 2016 This edition also contains some enhanceive updates related to materiality in review engagements professional skepticism and more illustrative accountant s reports **Accountants' Handbook, Volume 2** D. R. Carmichael, O. Ray Whittington, Lynford Graham, 2007-04-06 This highly regarded reference is relied on by a considerable part of the accounting profession in their day to day work This handbook is the first place many accountants look to find answers to practice questions Its comprehensive scope is widely recognized and relied on It is designed as a single reference source that provides answers to all reasonable questions on accounting and financial reporting asked by accountants auditors bankers lawyers financial analysts and other preparers and users of accounting information

Personal Financial Planning and Investment Pocket Guide Joel G. Siegel, Jae K. Shim, 1989 **Campaign Guide for Congressional Candidates and Their Committees**, 2004 Wiley Practitioner's Guide to GAAS 2011 Steven M. Bragg, 2010-12-01 The clearest easiest to use guide to understanding GAAS 2011 on the market fully updated This latest resource to understanding GAAS addresses the toughest part of the job identifying interpreting and applying the many audit attest review and compilation standards relevant to a particular engagement A brief identification of each SAS SSAE and SSARS with its effective date and tips on when to apply it A convenient and comprehensive glossary of official definitions which are usually scattered throughout a standard Behind the scenes explanations of the reasons for each pronouncement

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Wiley Practitioner's Guide to GAAS 2013 Joanne M. Flood,2012-12-05 The clearest easiest to use guide to understanding GAAS 2013 on the market fully updated This latest resource to understanding GAAS addresses the toughest part of the job identifying interpreting and applying the many audit attest review and compilation standards relevant to a particular engagement The only GAAS reference organized according to practitioners actual use of the Statements on Auditing Standards SASs inside you ll find examples and illustrations for testing internal controls techniques for remaining compliant with each standard and explanations of the reasons for each pronouncement A brief identification of each SAS SSAE and SSARS with its effective date and tips on when to apply it A convenient and comprehensive glossary of official definitions which are usually scattered throughout a standard Behind the scenes explanations of the reasons for each pronouncement and brief explanations of the basic ideas of the section Concise listing and descriptions of each standard s specific mandate Easy to read capsule summary of interpretations plus selected AICPA practice alerts and advisories Helpful techniques for remaining compliant with each standard Examples and illustrations for testing internal controls Wiley Practitioner s Guide to GAAS 2013 presents each statement individually explaining how the standards are related and offering guidance on the entire engagement process in the form of practice notes checklists questionnaires and real world examples that illustrate how the fundamental requirements of each section are applied *Electrician's Exam Preparation Guide* John E. Traister,2005 A question and answer study guide for students and apprentices preparing to take the journeyman s or master s electrician s exam based on the 2005 National Electrical Code Wiley Practitioner's Guide to GAAS 2008 Michael J. Ramos,2007-12-04 The clearest easiest to use guide to understanding GAAS 2008 on themarket fully updated The 2008 edition includes Risk Assessment Standards effective for December 31 2007 Financial Statement Audits The only reference that offers the most comprehensive coverage of generally accepted auditing standards practices and procedures Wiley Practitioner 2s Guide to GAAS 2008 explains and interprets the standards in clear easy to understand language Offering the accounting professional a clear accessible distillation of the official language of Statements on Standards for Attestation Engagements SSAEs and Statements on Standards for Accounting and Review Services SSARSs this invaluable resource provides advice on exactly when and how to remain fully compliant with each Michael J Ramos

Denver CO was an auditor with KPMG and now works as an author and consultant He is the author of How to Comply with Sarbanes Oxley Section 404 Assessing the Effectiveness of Internal Control Second Edition 0 471 74066 7 and The Sarbanes Oxley Section 404 Implementation Toolkit Practice Aids for Managers and Auditors 0 471 71225 6 **Kiplinger's Personal Finance**, 1981-02 The most trustworthy source of information available today on savings and investments taxes money management home ownership and many other personal finance topics Ocboa Guide (2007), J. Russell Madray, 2006-03 The Miller OCBOA Guide is the first comprehensive manual written for the growing number of practitioners and small businesses who need understandable guidance when preparing and reporting on OCBOA financial statements *Wiley The Complete Guide to Auditing Standards, and Other Professional Standards for Accountants 2008* Nick A. Dauber, Anique Ahmed Qureshi, Marc H. Levine, Joel G. Siegel, 2008-07-07 If you are an auditor or work frequently with auditors you need quick answers on the latest auditing standards Get the answers you need now to understand and comply with authoritative auditing standards The Complete Guide to Auditing Standards and Other Professional Standards for Accountants 2008 is filled with charts checklists diagrams report forms schedules tables exhibits examples practice aids and step by step instructions for your maximum ease of use Wiley CPAexcel Exam Review 2014 Study Guide O. Ray Whittington, 2013-11-07 Everything today's CPA candidates need to pass the CPA Exam Published annually this Auditing and Attestation volume of the comprehensive four volume paperback reviews all current AICPA content requirements in auditing and attestation Many of the questions are taken directly from previous CPA exams With 2 800 multiple choice questions in all four volumes these study guides provide all the information candidates need to master in order to pass the computerized Uniform CPA Examination Its unique modular format helps you zero in on those areas that need more attention and organize your study program Complete sample exam The most effective system available to prepare for the CPA exam proven for over thirty years Timely up to the minute coverage for the computerized exam Contains all current AICPA content requirements in auditing and attestation Unique modular format helps candidates zero in on areas that need work organize their study program and concentrate their efforts Comprehensive questions over 2 800 multiple choice questions and their solutions in the four volumes Guidelines pointers and tips show how to build knowledge in a logical and reinforcing way Other titles by Whittington Audit Sampling An Introduction Fifth Edition Wiley CPA Exam Review 2014 arms test takers with detailed outlines study guidelines and skill building problems to help candidates identify focus on and master the specific topics that need the most work PC Mag, 1984-10-16 PCMag com is a leading authority on technology delivering Labs based independent reviews of the latest products and services Our expert industry analysis and practical solutions help you make better buying decisions and get more from technology **Kiplinger's Personal Finance**, 1993-10 The most trustworthy source of information available today on savings and investments taxes money management home ownership and many other personal finance topics Wiley CPAexcel Exam Review 2016 Study Guide January O. Ray Whittington, 2015-12-14 The

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