

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

KJ Lindholm-Leary



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