

PERSONAL FINANCIAL STATEMENT

Personal Financial Statement as of (date)

Type of Application Individual Joint

APPLICANT INFORMATION

Name
Email
Phone Number
Date of Birth
SSN
Home Address
Rent Expenses (If Applicable)

CO-APPLICANT INFORMATION (IF APPLICABLE)

Name
Email
Phone Number
Date of Birth
SSN
City State Zip

ASSETS

Cash in bank accounts (Schedule A)
Publicly traded investments (Schedule B)
Total Liquid Assets
Retirement Accounts (Schedule C)
Real Estate (Schedule D)
Other Real Estate Market Value
(Provide Schedule G Addendum)
Other Assets
Total Non-Current Assets
Total Assets

LIABILITIES

Total Revolving Credit (Schedule E)
Total Student and Installment Loans (Schedule F)
Mortgage On Personal Residence (Schedule D)
Mortgage(s) On Other Real Estate (Schedule G)
Business Debt
Other Liabilities
Total Liabilities
Net Worth

APPLICANT GENERAL INFORMATION

Are you a Citizen of the United States? Yes No
If no, are you a permanent resident alien? Yes No
Country of citizenship
Green card
Are you a defendant in any legal action? Yes No
Income taxes paid up to date? Yes No
Have you declared bankruptcy? Yes No
Partner/officer in any other venture? Yes No
Any assets pledged other than shown? Yes No

CO-APPLICANT GENERAL INFORMATION

Are you a Citizen of the United States? Yes No
If no, are you a permanent resident alien? Yes No
Country of citizenship
Green card
Are you a defendant in any legal action? Yes No
Income taxes paid up to date? Yes No
Have you declared bankruptcy? Yes No
Partner/officer in any other venture? Yes No
Any assets pledged other than shown? Yes No

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CONTINGENT LIABILITIES

As endorser, co-maker, or guarantor on leases or contracts Yes No Legal Claims Yes No
 Federal or State Income Taxes Yes No Other Yes No

SCHEDULE A - CASH IN BANK ACCOUNTS			
Bank Name	Account Type	Ownership	Deposit Amount
		Select One	
		Select One	
		Select One	
		Select One	
Totals			\$ 0.00

SCHEDULE B - PUBLICLY TRADED INVESTMENTS				
Description	Ownership	Registered Name(s)	Shares/Amount	Current Value
	Select One			
	Select One			
	Select One			
	Select One			
Totals			0	\$ 0.00

SCHEDULE C - RETIREMENT ACCOUNTS				
Description	Ownership	Registered Name(s)	Shares/Amount	Current Value
	Select One			
	Select One			
	Select One			
	Select One			
Totals			0	\$ 0.00

SCHEDULE D - PERSONAL REAL ESTATE					
	Property 1	Property 2	Property 3	Property 4	Totals
Property Type (primary, rental, SF, MF, C, L, etc.)					
Address					
Date Purchased					
Purchase Price					
Present Market Value					\$ 0.00
Lien Holder/Bank					
Mortgage Balance					\$ 0.00
Real Estate Tax (if not escrowed)					\$ 0.00
Monthly Payment (principal & interest)					\$ 0.00
Monthly Income (if leased)					\$ 0.00

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SCHEDULE E - REVOLVING CREDIT

Bank Name	Description	Collateral	Credit Limit	Monthly Payment	Current Balance
					\$ 0.00
Totals			\$ 0.00	\$ 0.00	\$ 0.00

SCHEDULE F - STUDENT & INSTALLMENT LOANS

Bank Name	Description	Original Amount	Interest Rate	Monthly Payment	Current Balance
					\$ 0.00
Totals		\$ 0.00		\$ 0.00	\$ 0.00

SCHEDULE G - PERSONAL REAL ESTATE

	Property 1	Property 2	Property 2	Property 4
Property (rental, SF, MF, C, L, etc.)				
Address				
Date Purchased				
Purchase Price				
Present Market Value				
Lien Holder/Bank				
Mortgage Balance				
Real Estate Tax (if not escrowed)				
Monthly Payment (principal & interest)				
Monthly Income (if leased)				

SCHEDULE G - PERSONAL REAL ESTATE *continued*

	Property 5	Property 6	Property 7	Property 8	Totals
Property (rental, SF, MF, C, L, etc.)					
Address					
Date Purchased					
Purchase Price					
Present Market Value					\$ 0.00
Lien Holder/Bank					
Mortgage Balance					\$ 0.00
Real Estate Tax (if not escrowed)					\$ 0.00
Monthly Payment (principal & interest)					\$ 0.00
Monthly Income (if leased)					\$ 0.00