



Lic # 0L01154

**PERSONAL FINANCIAL STATEMENT**  
**CONFIDENTIAL**

Personal Financial Statement of \_\_\_\_\_

Applicant's Name(s) \_\_\_\_\_

Home Address \_\_\_\_\_

Home Phone \_\_\_\_\_

*Please complete the entire statement. Include spouse information. Please do not leave any questions unanswered. Incomplete or improperly completed statements will delay our ability to complete a review of your file.*

Assets	In Even Dollars	Liabilities and Net Worth	In Even Dollars
Cash on hand and in Banks—See Schedule A	\$	Notes Payable: This Bank—See Schedule A	\$
U.S. Government Securities—See Schedule B		Notes Payable: Other Institutions—See Schedule A	
Listed Securities—See Schedule B		Notes Payable—Relatives	
Unlisted Securities—See Schedule B		Notes Payable—Others	
Accounts and Notes Receivable		Accounts and Bills Due	
Real Estate Owned—See Schedule C		Unpaid Taxes	
Mortgages and Land Contracts Receivable—See Schedule D		Mortgages and Land Contracts Payable—See Schedule C or D	
Cash Value Life Insurance—See Schedule E		Life Insurance Loans—See Schedule E	
		Other Liabilities	
		<b>TOTAL LIABILITIES</b>	<b>\$</b>
		<b>NET WORTH</b>	<b>\$</b>
<b>TOTAL ASSETS</b>	<b>\$</b>	<b>TOTAL LIABILITIES AND NET WORTH</b>	<b>\$</b>

Sources of Income	In Even Dollars	General Information
Salary	\$	Employer
Bonus and Commissions		Position or Profession
No. of Years		
Dividends		Employer's Address
Real Estate Income		Partner, officer or owner in any venture? <input type="checkbox"/> No <input type="checkbox"/> Yes
		If so, explain
<b>TOTAL:</b>	<b>\$</b>	
Alimony, child support or separate maintenance payments need not be disclosed unless relied upon as a basis for extension of credit. If disclosed, payments received under <input type="checkbox"/> court order <input type="checkbox"/> written agreement <input type="checkbox"/> oral understanding.		Are any assets pledged? <input type="checkbox"/> No <input type="checkbox"/> Yes Detail in Schedule A.
		Income taxes settled through (date)