

Personal Financial Statement

DATE PREPARED: _____

BUSINESS NAME: _____

Full Name: _____ Home Address: _____

Date of Birth: _____ SSN #: _____ Home Phone: _____

Spouse Full Name: _____ Spouse Date of Birth: _____ Spouse SSN #: _____

ASSETS	
Cash in Bank (Savings & Checking)	
CD's	
Stocks, Bonds & Marketable Securities (list in Sch. A)	
Cash Surrender Value Life Insurance (list in Sch. B)	
Real Estate Owned (list in Sch. C)	
Business Ventures (list in Sch. D)	
Notes Receivable (list in Sch. E)	
Personal Property (jewelry, coins, collections, etc.)	
Cars, RV's, Boats, Motorcycles	
Other Assets (list below):	
TOTAL ASSETS	

LIABILITIES	
Credit Card Debt (list in Sch. F)	
Real Estate Mortgage Debt (list in Sch. C)	
Other Debt Payable (list in Sch. F)	
Taxes Payable	
Accrued Expenses Payable	
Other Liabilities (list below):	
TOTAL LIABILITIES	
TOTAL NET WORTH	
TOTAL LIABILITIES & NET WORTH	

Schedule A: Stocks, Bonds & Marketable Securities

Individual Security or Account Description	In Name of	Market Value

Schedule B: Life Insurance

Name of Insurance Company	Owner of Policy	Name of Insured	Beneficiary	Face Amount	Policy Loans	Cash Surrender Value

Schedule C: Real Estate Owned

Address	Type of Property	Title in Name of	% Owned	Year Acquired	Cost	Market Value	Monthly Payment	Mortgage Balance

Schedule D: Business Ventures

Name of Business	Type of Business	Year Formed	Net Worth (Equity)

Schedule E: Notes Receivable

Individual or Business Due From	Amount Due	Monthly Payment	Due In Full Date	Description

Schedule F: Other Debt (Credit Cards, HELOC, Auto, etc.)

Name of Creditor	Description of Debt	Amount Owed	Monthly Payment	Maturity Date	Security/Collateral

The information contained in this statement is provided to induce a surety company to extend or continue to extend credit to the undersigned or to others upon the surety of the undersigned. The undersigned acknowledge and understand that the information contained in this statement is relied upon by a surety company in deciding to grant or continue to grant credit. Each of the undersigned represents, warrants, and certifies that the information provided herein is true, correct and complete. Each of the undersigned agrees to notify the surety company immediately in writing of any adverse change to (1.) any information contained in this statement or (2.) in the financial condition of the undersigned or (3.) in the ability of any of the undersigned to perform their obligations to the surety company. The undersigned also understands that a surety company will need to pull personal credit reports in order to determine their appetite for extending credit thus the undersigned authorizes the recipient of this statement to obtain their personal credit information for the purposes of underwriting.

Signature (applicant): _____

Date Signed: _____

Signature (spouse/co-applicant): _____

Date Signed: _____