



PERSONAL FINANCIAL STATEMENT

All individuals owning 20% or more of the business must complete this entire section.

Name (Last, First)	Home Phone Number
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Social Security Number	Date of Birth	Business Phone Number
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Present Address (<input type="checkbox"/> Own <input type="checkbox"/> Rent) Years at Address _____	Previous Address if less than 2 years (<input type="checkbox"/> Own <input type="checkbox"/> Rent) Years at Address _____
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Employer	Position/Title	Salary	How Long
Previous Employer (if less than 2 years at current employer)	Position/Title	Salary	How Long

Assets	<input type="checkbox"/> Assets Jointly Owned <input type="checkbox"/> Assets Owned Individually
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Cash on hand & in Banks.....	\$	_____
Savings Accounts.....	\$	_____
IRA or Other Retirement Account.....	\$	_____
Securities (Stocks & Bonds).....	\$	_____
Life Insurance (Cash Surrender Value).....	\$	_____
Real Estate.....	\$	_____
Automobile.....	\$	_____
Other Personal Property*.....	\$	_____
Other Assets*.....	\$	_____
TOTAL	\$	_____

*Other Personal Property and Other Assets (Describe details)

Income

Salary.....	\$	_____
Net Investment Income.....	\$	_____
Real Estate Income.....	\$	_____
Other Income*.....	\$	_____

*Other Income (Describe details)

Notes Payable to Banks and Others (Auto, Mortgage, etc.)

Name of Creditor(s)	Original Balance	Current Balance	Payment Amount /Frequency	Type of Collateral

Real Estate Owned	Property A	Property B	Property C
Type of Property			
Address			
Date Purchased			
Original Cost			
Present Market Value			
Name of Mortgage Holder			
Mortgage Account Number			
Mortgage Balance			
Payment Amount			
Property Taxes			
Insurance Company			

Other Liabilities

Life Insurance

I authorize Lender to make inquires as necessary to verify of the statements made and to determine my creditworthiness. I certify the above and the statements contained in the attachments and accurate as of the stated date(s). These statements are made for the purpose of either obtaining a loan or guaranteeing a loan.

Signature: _____ **As of:** ____/____/____