

## PERSONAL FINANCIAL STATEMENT

Section 1 – Individual Information (type or pri	nt) Section 2	2 –	Other Party Informati	on (type or print)			
Name:			Name:				
Address:			Address:				
City, State & Zip:			City, State & Zip:				
Position or Occupation:			Position or Occupation:				
Business Name:			Business Name:				
Business Address:			Business Address:				
City, State & Zip:			City, State & Zip:				
Length of Employment:			Length of Employment:				
Res. Phone: Bus. Phone:			Res. Phone:	Bus. Phone:			
Section 3 – Statement of Financial Condition	as of 20						
	In dollars		1:5	la ilidia a	In dollars		
Assets (Do not include assets of doubtful value)	(omit cents)		Lia	abilities	(omit cents)		
Cash on hand and in this bank			Notes payable to banks -	see Schedule E			
Cash in other banks			Notes payable to other ins	titutions - see Schedule E			
U.S. Gov't & marketable securities - See Schedule A			Due to brokers				
Non-marketable securities - See Schedule B			Amounts payable to others	s - secured			
Securities held by broker in margin accounts			Amounts payable to others	s - unsecured			
Restricted, control, or margin account stocks		Ī	Accounts and bills due				
Real estate equities - See Schedule C		1	Unpaid income tax				
Accounts, loans, and notes receivable		i	Other unpaid taxes and in	terest			
Automobiles		1	Real estate mortgages pa	yable - see Schedules C & E			
Other personal property		1	Other debts (car payments	s, credit cards, etc.) - itemize			
Cash surrender value-life insurance - See Schedule D		Ħ					
Other assets - itemize - See Schedule F if applicable		1					
		1					
		1	Total Liabilities:				
		T	Net Worth:				
Total Assets	╗	Total Liabilities and Net Worth:					

Section 4 – Annual Income For Year Ended_20	Annual Expenditures	Contingent Liabilities	Estimated Amounts
Salary, bonuses & com. Dividends & interest Real estate income Other income (alimony, child support, or separate maintenance income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation.)	Mortgage/rental payments Real estate taxes & assessments Taxes - Federal/State/Local Other contract payments (car payments, charge cards, etc.) Alimony, child support, maintenance Other expenses	Do you have any: Yes No Contingent liabilities (as endorser co-maker or guarantor? on leases? on contracts?) Involvements in pending legal actions? Other special debt or circumstances? Contested income tax liens? If "yes" to any question(s) describe:	
Total Income:	Total Expenditures:	Total Contingent Liabilities:	

## SCHEDULE A – U.S. GOVERNMENT & MARKETABLE SECURITIES

Number of shares or face value of bonds	Description	In name of	Are these registered pledged or held by others?	Market value

## SCHEDULE B - NON-MARKETABLE SECURITIES

Number of shares or face value of bonds	Description	In name of	Are these registered pledged or held by others?	Market value	Source of value

## SCHEDULE C – RESIDENCES & OTHER REAL ESTATE EQUITY (PARTIALLY OR WHOLLY OWNED)

Address & type of property	% of ownership	Date acquired	Cost	Market value	Monthly payment	Mortgage amount	Mortgage maturity

Name of insurance company		Owner of policy		Beneficiary relationsh		F	ace a	amount	Policy loans		Cash surrender value
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			<del>╎</del> ┝								
CHEDULE E – BAN	IK AN	ID OTHER INS		JTIONAL R	1			Uncour	ed or secured	Т	Amount owed
of creditor	loa	an/line amount	ט	ate of loan	Iwatur	ity dat	B	1	collateral)	'	Amount owed
										╁	
CHEDULE F – BAN  Name and address o any business ventures which you are a princip or	f in	Total assets listed in section 3		JTIONAL R % of ownership	ELATIO Position in the bu	/Title	PS	Total assets of business	Line of busin	iess	Years in business
Name and address o any business ventures which you are a princip	f in	Total assets listed in section		% of	Position	/Title	PS	assets of	Line of busin	iess	Years in business
Name and address o any business ventures which you are a princip or	f in	Total assets listed in section		% of	Position	/Title	PS	assets of	Line of busin	less	
Name and address o any business ventures which you are a princip or	f in	Total assets listed in section		% of	Position	/Title	PS	assets of	Line of busin	less	
Name and address o any business ventures which you are a princip or	f in	Total assets listed in section		% of	Position	/Title	PS	assets of	Line of busin	ess	