

PERSONAL FINANCIAL STATEMENT

NOTE: This form is to be used for Personal Financial Statements only. NOT TO BE USED FOR BUSINESS STATEMENTS.

NAME _____ SS NUMBER _____

BUSINESS ADDRESS _____

RESIDENCE ADDRESS _____

STATEMENT AS OF (MONTH) _____ (DAY) _____ 19 _____

ASSETS		LIABILITIES	
Cash on hand and in Banks		Notes payable to Banks – Secured	
U. S. Gov. Securities – see schedule		Notes payable to Banks – Unsecured	
Listed Securities – see schedule		Notes payable to relatives	
Unlisted Securities – see schedule		Notes payable to others	
Accounts and Notes Receivable Due from relatives and friends		Accounts and bills due	
Accounts and Notes Receivable Due from others – good		Unpaid Income Taxes	
Accounts and Notes Receivable Doubtful		Other unpaid taxes and interest	
Real Estate owned – see schedule		Real Estate Mortgages payable – see schedule	
Automobiles and other Vehicles		Chattel Mortgages and Other Liens payable	
Equipment		Other debts – itemize	
Personal Property			
Cash Value – Life Insurance			
Other assets - itemize			
		TOTAL LIABILITIES	
		NET WORTH	
TOTAL ASSETS		TOTAL LIABILITIES & NET WORTH	

SOURCES OF INCOME		PERSONAL INFORMATION	
Salary	\$	Business or Occupation	Age
Bonus and Commissions	\$	Partner or officer in any other venture	
Dividends	\$	Married	Children
Real Estate Income	\$	Single	Dependents
Other Income	\$		
TOTAL	\$		
CONTINGENT LIABILITIES		GENERAL INFORMATION	
As endorser, co-maker or guarantor	\$	Are any assets pledged? – see schedule	
On leases or contracts	\$	Are you a defendant in any suits or legal actions?	
Legal claims	\$	Personal Bank Accounts carried at	
Provisions for Federal Income Taxes	\$	Have you ever taken bankruptcy? Explain:	
Other special debt	\$		

SCHEDULE OF U.S. GOVERNMENTS, STOCKS AND BONDS OWNED

No. of shares or Face value (Bonds)	Description	In name of	Market value

SCHEDULE OF REAL ESTATE OWNED

Description of property and improvements	Date Acquired	Title in Name of	Cost	Market Value	Mortgage	
					Amount	Maturity

SCHEDULE OF LIFE INSURANCE CARRIED, INCL. N.S.L.I. AND GROUP INSURANCE

Amount	Name of Company	Beneficiary	Cash Surrender Value	Loans

SCHEDULE OF ASSETS PLEDGED

Description	Value	To Whom Pledged

GIVE NAMES OF BANKS OR FINANCE COMPANIES WHERE CREDIT HAS BEEN OBTAINED

Name	Date	High Credit	Basis

THE UNDERSIGNED CERTIFIES THAT BOTH PAGES HEREOF AND THE INFORMATION INSERTED THEREIN HAS BEEN CAREFULLY READ AND IS TRUE AND CORRECT.

_____ 19 _____
Date Signed Signature