## PERSONAL FINANCIAL STATEMENT

Financial Condition as of \_\_\_\_\_\_, 20\_\_\_\_\_

Borrower Full Name:					C0-Borrower Full Name (Spouse):								
Street Address:					Street Address:								
City, State, Zip:					City, State, Zip:								
Since:	Own: Yes /	No	Rei \$	nt: /mo	Since:	Own: Yes /	No	Rent: \$ /mo					
Previous Address (if					Previous Address (if less than 5 years at present):								
City , State, Zip:					City , State, Zip:								
Since:	Since: Owned: Re			nted: Yes / No	Since: Owned: Yes / No			Rented: Yes / No					
Social Security #:		Date of B			Social Security #:		Date of B						
Res. Phone:		Bus. Pho	ne:		Res. Phone:		Bus. Pho	ne:					
Employer:					Employer:								
Position or Occupation	on:			How Long:	Position or Occupation	on:		How Long:					
Business Address:					Business Address:								
City, State, Zip:					City, State, Zip:								
Marital Status: Unmarried		Married		Separated	Marital Status: Unmarried Married Separa								
Assets				In Dollars	Lia	bilities		In Dollars					
Cash on hand – see	Schedule A				Notes payable to ban	ıks							
Marketable securities	s – see Sche	edule B			Notes payable to other	er institution	S						
Non-marketable secu	ırities – see	Schedule E	В		Due to brokers								
Securities held by bro	oker in marg	in accounts	s		Amounts payable to	others – sec	ured						
Restricted, control, or	r margin acc	ount stock	s		Amounts payable to								
Retirement Accounts	, IRA's – se	e Schedule	Α		Accounts and bills du								
Real Estate Owned -	- see Real E	state Sch.			Unpaid income tax								
Accounts, loans, and	notes recei	vable			Other unpaid taxes a								
Automobiles present	value				Real estate mortgage								
Other personal prope	erty				Credit cards								
Life insurance – cash	surrender v	/alue			Auto loans								
Other assets - itemize	е				Other liabilities - item								
					Total Liabilities								
Total Assets						Net Worth							
Total Assets					Net Worth Total Liabilities and	Net Worth							

**Combined Annual Income and Expenses** 

Annual Income for year ended	Annual Expenditures
Salaries	Rent
Bonuses	Mortgage payments
Commission	Real estate taxes
Dividends & Interest	Insurance payments
Net real estate income	Homeowners assoc. dues
Other income - itemize	Alimony, child support
	Other expenses - itemize
Total Income	Total Expenditures

If you answer "yes" to any of the following questions, please provide an explanation on a separate sheet.
1.) Are you a Co-Maker, endorser or guarantor of any other person's debt? Yes No
2.) Are there any outstanding judgments against you? Yes No
3.) Have you ever been the subject of bankruptcy case? Yes No
4.) Are you a party to a lawsuit? Yes No
5.) Are you obligated to pay alimony, child support or separate maintenance? Yes No
6.) Is any part of the down payment borrowed? Yes No
7.) Have you directly or indirectly been obligated on any loan which resulted in foreclosure, transfer of title in lieu of foreclosure, or indigenent? Yes No
8.) Are you presently delinquent or in default on any Federal debt or any other loan, mortgage, financial obligation bond, or loan guarantee? Yes No
9.) Are you a U.S. Citizen? Yes No
10.) Are you a permanent resident alien? Yes No

**Schedule A** – list every cash, saving, CD, Retirement and IRA accounts below.

Name of Institution	Address	Account Number	Balance

<b>Schedule B</b> – list all securities / brokerage accounts below.	Alternatively, you may attach a recent monthly statement with the same
detail as requested below	

No. of Shares	Description	Registered in Name(s) of	Listed or Unlisted	Current Market Value

Borrower Signature:
Date Signed:
Co-Borrower Signature:
Date Signed:

## SCHEDULE OF REAL ESTATE OWNED

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	Net Income: (1) minus (2) & (3).																				
	(3) Annual Loan Pmnt (incl. Int.)																				
	(2) Annual Expenses																				
	% (1) Annual Rental																				
-	% Vacant																				
	Balance of Mortgages	1st T.D.	2nd T.D.																		
	Market Value																				Date
	Loan Number																				
ownersnip in any property is less than 100%, indicate other owners and their percentage of ownersnip in the remarks section at the bottom	Name and Address of Lenders of Mortgages																				
eir percentage of owner	Acquisition Date/Cost	Date:	€9	Date:	·	Date:	·	Date:	↔	Date:	₩	Date:	€9	Date:	↔	Date:	€9				
sate other owners and th	Type of Property																				
an 100%, indi-	% of Ownership																				
It percentage of ownership in any property is less tha	Property Address																		Remarks:	. •	Signed
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