

# PERSONAL FINANCIAL STATEMENT Page 1 of 2

Borrower/Guarantor 1 (print name)		SS# _____	DOB: __/__/__
Borrower/Guarantor 2 (print name)		SS# _____	DOB: __/__/__
Assets			
Personal Items	J/S/B*	Description	estimate \$
Personal home		Address:	
Second personal home		Address:	
Vehicle		Make/Model/Yr:	
Vehicles		Make/Model/Yr	
Jewelry			
Artwork			
Furniture			
Electronics			
Antiques			
Other Asset			
Other Property		Address:	
Cash or Cash Equivalent	J/S/B*	Bank/Company name	estimate \$
Checking account			
Savings account			
Certificates of deposit			
Money market account			
Life insurance (cash value of available funds)			
Other			
Investments	J/S/B*	Bank/Brokerage Firm	estimate \$
Stocks & Bonds marketable			
Mutual funds			
Individual stock shares (non liquid or not publically traded)			
investment income property (schedule A)			
investment prop non-income (attach schedule A if multiple)			
Annuities/IRA's/other retirement			
Annuities/IRA's/other retirement			
Other investment			
Business ownership			
Assets Total			)

\* Please indicate whether the assets is titled as a single (S), joint (J) asset. If it is a business asset (B), please provide business name.

# PERSONAL FINANCIAL STATEMENT Page 2 of 2

Liabilities			
Loan Balances	Bank or Company name	Monthly Pay	Estimated Balance
Home Mortgage (Primary)			
Home Mortgage ( 2nd home)			
2nd mortgage/equity loans			
Vehicle loan			
Vehicle loan			
Total Other Real estate loans (on Sched A)			
Student loans			
Other installment loan			
Other installment loan			
Credit card debt			
Credit card debt			
Credit card debt			
Credit card debt			
Other Debt			
Other Debt			
Other Debt			
<b>Liabilities Total</b>			\$ -

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Borrower/Guarantor 1                      Date

\_\_\_\_\_

Borrower/Guarantor 2                      Date

Office Use only	Assets	
	Liabilities	
	Net Worth	
	Cash and liquid investments	
	Other	