

PERSONAL FINANCIAL STATEMENT

APPLICANT (NAME)			CO-APPLICANT (NAME)		
HOME ADDRESS			HOME ADDRESS (INDICATE "SAME" IF SAME AS APPLICANT)		
CITY, STATE, ZIP			CITY, STATE, ZIP (INDICATE "SAME" IF SAME AS APPLICANT)		
HOME PHONE	S.S. NUMBER	DATE OF BIRTH	HOME PHONE	S.S. NUMBER	DATE OF BIRTH
EMAIL ADDRESS:			EMAIL ADDRESS:		

BALANCE SHEET (OMIT CENTS), PREPARED AS OF: _____

ASSETS	IN DOLLARS	LIABILITIES	IN DOLLARS
CASH ON HAND AND IN BANKS		NOTES PAYABLE TO BANKS	
U. S. GOV. AND LISTED SECURITIES – SCHED. A		NOTES PAYABLE TO RELATIVES AND OTHERS	
UNLISTED SECURITIES – SCHED. B		ACCOUNTS AND BILLS PAYABLE	
ACCOUNTS AND NOTES RECEIVABLE		UNPAID TAXES AND INTEREST	
RESIDENTIAL REAL ESTATE – SCHED. C		REAL ESTATE MORTGAGES PAYABLE – SCHED. C	
AUTOMOBILES/OTHER PERSONAL PROPERTY		OTHER DEBTS – (credit cards, auto loans/leases, etc.)	
NET CASH SURRENDER VALUE/LIFE INS. – SCHED D			
OTHER ASSETS			
TOTAL ASSETS:		TOTAL LIABILITIES:	

PERSONAL INCOME STATEMENT

ANNUAL INCOME	AMOUNT(S)	ANNUAL EXPENDITURES	AMOUNT(S)
SALARY (applicant)		INCOME AND OTHER TAXES	
SALARY (co-applicant)		RENTAL PAYMENTS, CO-OP OR CONDO MAINT.	
BONUSES/COMMISSIONS (applicant)		MORTGAGE PAYMENTS – RESIDENTIAL	
BONUSES/COMMISSIONS (co-applicant)		MORTGAGE PAYMENTS – INVESTMENT	
RENTAL INCOME		PROPERTY TAXES – RESIDENTIAL	
INTEREST INCOME		PROPERTY TAXES – INVESTMENT	
DIVIDEND INCOME		PRINCIPAL AND INTEREST PAYMENTS ON LOANS	
CAPITAL GAINS		INSURANCE (life, property and casualty)	
OTHER INVESTMENT INCOME		INVESTMENTS (including tax shelters)	
OTHER INCOME		ALIMONY/CHILD SUPPORT	
		TUITION	
		OTHER LIVING EXPENSE	
		OTHER EXPENSE	
TOTAL INCOME:		TOTAL EXPENDITURES:	

SCHEDULE A – READILY MARKETABLE SECURITIES (stocks, bonds, U.S. Governments, municipals and non-money market mutual funds)

NO. OF SHARES (STOCK) OR FACE VALUE (BONDS)	DESCRIPTION	OWNER(S)	WHERE HELD	COST	CURRENT MARKET VALUE	PLEGGED	
						Yes	No

SCHEDULE B – NON-READILY MARKETABLE SECURITIES (closely held, thinly traded or restricted stocks)

NO. OF SHARES (STOCK) OR FACE VALUE (BONDS)	DESCRIPTION	OWNER(S)	WHERE HELD	COST	CURRENT MARKET VALUE	PLEGGED	
						Yes	No

SCHEDULE C – PERSONAL RESIDENCE AND REAL ESTATE INVESTMENTS, MORTGAGE DEBT (majority ownership only)

(RESIDENTIAL)					
ADDRESS		DEED IN NAME OF		COST	
1.					
2.					
3.					
MORTGAGE HELD BY		CURRENT MARKET VALUE		UNPAID BALANCE	
1.					
2.					
3.					
(INVESTMENT)					
ADDRESS		DEED IN NAME OF		PERCENT OWNED	COST
1.					
2.					
3.					
MORTGAGE HELD BY		CURRENT MARKET VALUE		UNPAID BALANCE	
1.					
2.					
3.					

SCHEDULE D - INSURANCE

LIFE INSURANCE	APPLICANT				CO-APPLICANT			
	BENEFICIARY	FACE VALUE	CASH VALUE	POLICY LOANS	BENEFICIARY	FACE VALUE	CASH VALUE	POLICY LOANS
WHOLE LIFE								
TERM LIFE								
GROUP TERM LIFE								

Signed By: _____ (APPLICANT) Date: _____

Signed By: _____ (CO-APPLICANT) Date: _____