



2. Name: \_\_\_\_\_

\_\_\_\_\_  
Address City State Zip

\_\_\_\_\_  
Home Phone Cell Phone Fax

\_\_\_\_\_  
Social Security # Driver's License # Email Address

\_\_\_\_\_  
Date of Birth Place of Birth Own or Rent your Home?

3. Name: \_\_\_\_\_

\_\_\_\_\_  
Address City State Zip

\_\_\_\_\_  
Home Phone Cell Phone Fax

\_\_\_\_\_  
Social Security # Driver's License # Email Address

\_\_\_\_\_  
Date of Birth Place of Birth Own or Rent your Home?

4. Name: \_\_\_\_\_

\_\_\_\_\_  
Address City State Zip

\_\_\_\_\_  
Home Phone Cell Phone Fax

\_\_\_\_\_  
Social Security # Driver's License # Email Address

\_\_\_\_\_  
Date of Birth Place of Birth Own or Rent your Home?

Applicant represents that all the above statements are true and correct and hereby authorizes verification of the above items including, but not limited to, the obtaining of a credit report and agrees to furnish additional credit references upon request.

Signature of Applicant: \_\_\_\_\_

Date: \_\_\_\_\_

Signature of Applicant: \_\_\_\_\_

Date: \_\_\_\_\_

## PERSONAL & CONFIDENTIAL FINANCIAL STATEMENT

Name: \_\_\_\_\_ Business Telephone: \_\_\_\_\_

Residential Address: \_\_\_\_\_ Home Telephone: \_\_\_\_\_

\_\_\_\_\_ Cell Phone: \_\_\_\_\_

VALUE OF ASSETS		LIABILITIES & NET WORTH	
Cash (on hand & in banks)		Unsecured Notes Payable (Credit Cards, etc.)	
U.S. Government Securities (T-Bills, Bonds)		Secured Notes Payable (Lines of Credit, etc.)	
Marketable Securities (Stocks, Mutual Funds)		School Loan	
Non-Marketable Securities			
Notes Receivable – Itemize			
Real Estate – Personal Residence Fair Market Value		Real Estate Mortgage – Primary Residence Current Balance	
Real Estate – 2 <sup>nd</sup> or 3 <sup>rd</sup> Homes Fair Market Value		Real Estate Mortgage – 2 <sup>nd</sup> or 3 <sup>rd</sup> Home Current Balance	
Real Estate – Income Property Fair Market Value		Income Property Mortgage Current Balance	
Partial Interests in Real Estate –(%) Your Net Equity Value			
Automobile #1 Year & Type		Automobile #1	
Automobile #2 Year & Type		Automobile #2	
Automobile #3 Year & Type		Automobile #3	
Boats, RV's, etc.		Boats, RV's, etc.	
Furniture, Personal Property & Jewelry		Furniture, Personal Property & Jewelry	
Business Interests – Itemize		Business Interests Loan	
		Other Liabilities – Itemize	
Other Assets – Itemize		Total Liabilities	
		Net Worth (Deduct Liabilities from Assets )	
<b>TOTAL ASSETS</b>		<b>TOTAL LIABILITIES &amp; NET WORTH</b>	

**PERSONAL & CONFIDENTIAL FINANCIAL STATEMENT**

SOURCES OF ANNUAL INCOME		GENERAL INFORMATION	
	Applicant	Spouse	
Salary			Are you a partner, stockholder, or officer in any other business venture? Applicant _____ Spouse _____
Commissions & Bonuses			
Dividends			
Real Estate Income			If so, what?
Spousal Support			
Child Support			
Other Income – Itemized			
			Are you, or have you ever been a defendant in any legal actions, suits or bankruptcy? Applicant _____ Spouse _____ Explain.
Total Annual Income			
Combined Annual Income			

CONTINGENT LIABILITIES		Comments:	
	Applicant	Spouse	
Endorser, Guarantor or Co-Oblige on Leases, Contracts or Loans			
Legal Claims?			
Income Tax Claims?			
Other – Itemize			

The undersigned represents that this financial statement is true and correct.

Signed \_\_\_\_\_  
Date

Signed \_\_\_\_\_  
Date

Name Printed \_\_\_\_\_

Name Printed \_\_\_\_\_

Please complete Financial Statements for each partner if not married or if a Corporation and personal guarantee is needed complete for Corporation and Personal.