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Personal Financial Statement

| INDIVIDUAL INFORMATION (type or print) | | | | JOINT PARTY INFORMATION (type or print) | | | |
|--|------------|------------------------|------------|---|------------|------------------------|------------|
| Name | | Name | | Name | | Name | |
| Address | | Address | | Address | | Address | |
| City/State/Zip | | City/State/Zip | | City/State/Zip | | City/State/Zip | |
| Position or Occupation | | Position or Occupation | | Position or Occupation | | Position or Occupation | |
| Employer's Name | | Employer's Name | | Employer's Name | | Employer's Name | |
| Employer's Address | | Employer's Address | | Employer's Address | | Employer's Address | |
| City/State/Zip | | City/State/Zip | | City/State/Zip | | City/State/Zip | |
| Length of Employment | | Length of Employment | | Length of Employment | | Length of Employment | |
| Home Phone | Cell Phone | Home Phone | Cell Phone | Home Phone | Cell Phone | Home Phone | Cell Phone |
| Business Phone | E-mail | Business Phone | E-mail | Business Phone | E-mail | Business Phone | E-mail |

| Schedule 1 CASH ON HAND | | |
|-------------------------|-----------------|---------|
| Institution | Type of Account | Balance |
| | | |
| | | |
| | | |
| | | |
| Total | | |

| Schedule 2 SCHEDULE OF REAL ESTATE OWNED | | | | | | |
|--|---------------|------------------|------|--------------|-----------|---------|
| Description of Property and Improvements | Date Acquired | Title In Name of | Cost | Market Value | Mortgages | |
| | | | | | Balance | Payment |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| Total | | | | | | |

| Schedule 3 ALL OTHER LOANS OR DEBTS | | | |
|-------------------------------------|------------|---------|---------|
| Financial Institution | Collateral | Balance | Payment |
| | | | |
| | | | |
| | | | |
| | | | |
| Total | | | |

| Schedule 4 SCHEDULE OF U.S. GOVERNMENTS, STOCKS AND BONDS OWNED | | | |
|---|--------------|------------|--------------|
| No. of Shares or Face Value (Bonds) | Descriptions | In Name of | Market Value |
| | | | |
| | | | |
| | | | |
| Total | | | |

| Schedule 5 SCHEDULE OF LIFE INSURANCE | | | | |
|---------------------------------------|-----------------|-------------|----------------------|-------|
| Amount | Name of Company | Beneficiary | Cash Surrender Value | Loans |
| | | | | |
| | | | | |
| | | | | |
| Total | | | | |

| Description of Property Covered | Dates of Acquisition | In Name of | Balance | Payment |
|---------------------------------|----------------------|------------|---------|---------|
| | | | | |
| | | | | |
| Total | | | | |

| ASSETS | | LIABILITIES | |
|--|------------|--------------------------------|------------|
| Cash On Hand | Schedule 1 | Mortgage and Land Contract Deb | Schedule 2 |
| Real Estate Owned | Schedule 2 | Notes Payable | Schedule 3 |
| Stocks/Bonds | Schedule 4 | Loans to Insurance Companies | Schedule 5 |
| Cash Value of Life Insurance | Schedule 5 | To Finance Companies | |
| Mortgages and Land Contracts Receivable | Schedule 6 | Accounts Payable | |
| Notes and Accounts Receivable - Current | | Federal Income Taxes | |
| Notes and Accounts Receivable - Past Due | | Property Taxes | |
| Automobiles | | Other Liabilities (Itemize) | |
| | | | |
| | | | |
| Personal Property | | | |
| | | | |
| Other Assets (Itemize) | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | TOTAL LIABILITIES | |
| | | NET WORTH | |
| TOTAL ASSETS | | TOTAL | |

| | | |
|--|-----------------|--|
| Personal Bank Account Carried At | | Are you defendant in any suite or legal action? If yes, explain on separate sheet. |
| Indicate if Any Assets Pledged | | |
| Date of Will | Who is Executor | Officer or principal in other companies |
| Do you pay alimony or child support? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, how much? | | Have you ever been in bankruptcy, personal or business? If yes, explain on separate sheet. |

| CONTINGENT LIABILITIES | | ANNUAL INCOME | |
|------------------------|--|--|--|
| As endorser or comaker | | Income from Employment | |
| On leases or contracts | | Income from Business or Profession | |
| Legal claims | | Income from Investments | |
| Other | | Income from Other Sources | |
| | | (Alimony, child support, or separate maintenance income, need not be revealed if you do not wish to have it considered as a basis for repaying this obligation.) | |
| | | Other | |
| | | | |
| | | | |
| | | TOTAL INCOME | |

Signature (individual) _____

Date of Birth _____

Social Security Number _____

Date Signed _____, 20____

Signature (other party) _____

Date of Birth _____

Social Security Number _____

Date Signed _____, 20_____