



Personal Financial Statement

As of Date:

Complete this form for: (1) each proprietor, or (2) each limited partner who owns 20% or more interest and each general partner, or (3) each stockholder owning 20% or more of voting stock and each corporate officer and director, or (4) any other person or entity providing a guaranty on the loan.

Applicant Name:

Address (Home):

City / State / Zip:

Email:

Mobile Phone:

DOB:

SSN:

Spouse Name:

Address (Home):

City / State / Zip:

Email:

Mobile Phone:

DOB:

SSN:

Business Name of Applicant/Borrower:

Assets & Liabilities

Assets	\$ *	Liabilities & Net Worth	\$
Cash-on-Hand and in Banks:		Accounts Payable:	
Savings Accounts:		Notes Payable to Banks and Others: <i>(Describe in Section 2)</i>	
IRA or Other Retirement Account:		Installment Account (Auto) Monthly Payments:	
Accounts and Notes Receivable:		Installment Account (Other) Monthly Payments:	
Life Insurance-Cash Surrender Value Only: <i>(Complete Section 8)</i>		Loan on Life Insurance:	
Stocks and Bonds: <i>(Describe in Section 3)</i>		Mortgages on Real Estate: <i>(Describe in Section 4)</i>	
Real Estate" <i>(Describe in Section 4)</i>		Unpaid Taxes: <i>(Describe in Section 6)</i>	
Automobile-Present Value:		Other Liabilities <i>(Describe in Section 7)</i>	
Other Personal Property: <i>(Describe in Section 5)</i>		Total Liabilities:	
Other Assets: <i>(Describe in Section 5)</i>		Net Worth:	
Total:		Total:	

* omit cents throughout

Section 1

Source of Income	\$	Contingent Liabilities	\$
Salary:		As Endorser or Co-maker:	
Net Investment Income:		Legal Claims & Judgments:	
Real Estate Income:		Provision for Federal Income Tax:	
Other Income <i>(Describe Below)</i> :		Other Special Debt:	

Description of Other Income in Section 1:

Section 2 Notes Payable to Banks and Others

Use attachments if necessary. Each attachment must be identified as a part of this statement and signed.

Name and Address of Note Holders	Original Balance, \$:	Current Balance, \$	Payment Amount, \$	Frequency monthly, etc.	How is the Note Secured or Endorsed? Type of Collateral

Section 3 Stock and Bonds

Use attachments if necessary. Each attachment must be identified as a part of this statement and signed.

Number of Shares	Name of Securities	Cost, \$	Market Value, \$ Quotation / Exchange	Date of Quotation / Exchange	Total Value, \$

Section 4 Real Estate Owned

List each parcel separately. Use attachments if necessary. Each attachment must be identified as a part of this statement and signed.

	Property A	Property B	Property C
Type of Property:			
Owner:			
Property Address:			
Date Purchased:			
Original Cost:			
Present Market Value:			
Mortgage Holder:			
Address of Mortgage Holder:			
Mortgage Account Number:			
Mortgage Balance, \$:			
Amount of Payment per Month/Year, \$:			
Status of Mortgage:			

Section 5 Other Personal Property and Other Assets

Describe, and if any is pledged as security, state name and address of lien holder, amount of lien, terms of payment, and if delinquent, describe delinquency.

Section 6 Unpaid Taxes

Describe in detail, as to type of taxes owed, to whom payable, amount and date due, and to what property, if any, a tax lien attaches.

Section 7 Other Liabilities

Describe in detail.

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Section 8 Life Insurance Held

Give face amount and cash surrender value of policies, name of insurance company and beneficiaries.

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I/We authorize CRDC and/or assigns to make inquiries as necessary to verify the accuracy of the statements made and to determine my creditworthiness. I/We certify the above statements contained in the attachments are true and accurate as of the state date(s). These statements are made for the purpose of either obtaining a loan or guaranteeing a loan. I/We understand FALSE statements may result in forfeiture of benefits and possible prosecution by the U.S. Attorney General (Reference 18 U.S.C 10001).

Applicant Signature:	
Date:	

Spouse Signature:	
Date:	