



PERSONAL FINANCIAL STATEMENT

FOR SECURITY PURPOSES, DO NOT RETURN THE COMPLETED STATEMENT VIA E-MAIL

CONFIDENTIAL - PLEASE DO NOT LEAVE ANY QUESTIONS UNANSWERED

For the purpose of procuring and maintaining credit from time to time in any form whatsoever with the above named Bank, for claims and demands against the undersigned, the undersigned submits the following as being a true and accurate statement of his/her financial condition on the following date, and agree that if any change occurs that materially reduces the means or ability of the undersigned to pay all claims or demands against him/her, the undersigned will immediately and without delay notify the Bank, and unless the Bank is so notified it may continue to rely upon the statement herein given as a true and accurate statement of the financial condition of the undersigned as of the close of business.

Full Name		SSN		Full Name		SSN	
Street Address				Street Address			
City, State		Zip		City, State		Zip	
Since	Owned or Rented			Since	Owned or Rented		
Previous Address if less than 5 years				Previous Address if less than 5 years			
City / State / Zip				City / State / Zip			
Since	Owned or Rented			Since	Owned or Rented		
Birth date	Dependents Excluding Self			Birth date	Dependents Excluding Self		
Phone: Residence		Work		Phone: Residence		Work	
Employer	Since			Employer	Since		
Address				Address			
Position / Title				Position / Title			
E-Mail Address				E-Mail Address			

ASSETS		LIABILITIES	
Cash Schedule (Schedule 1)	\$0.00	Insurance Loans (Schedule 3)	\$0.00
Securities (Schedule 2)	\$0.00	Profit Sharing and Pension (Schedule 5)	\$0.00
Life Insurance Cash Value (Schedule 3)	\$0.00	Retirement Accounts (Schedule 5)	\$0.00
Mortgages and Contracts Held by You (Schedule 4)	\$0.00	Mortgages on Home (Schedule 6)	\$0.00
Retirement Accounts, Include IRA Accounts (Schedule 5)	\$0.00	Mortgages on Other Real Estate (Schedule 6)	\$0.00
Profit Sharing & Pension (Schedule 5)	\$0.00	Short Term Notes Due Financial Institutions (Schedule 8)	\$0.00
Primary Residence (Schedule 6)	\$0.00	Short Term Notes Due to Others (Schedule 8)	\$0.00
Other Real Estate (Schedule 6)	\$0.00	Installment Loans and Contracts (Schedule 8)	\$0.00
Automobiles (Schedule 7)	\$0.00	Credit Account and Bills Due (Schedule 9)	\$0.00
Personal Property (Schedule 7)	\$0.00	Contingent Liabilities (Schedule 10)	\$0.00
Other Assets (Schedule 7)	\$0.00	Other Liabilities (Schedule 11)	\$0.00
TOTAL Assets \$	\$0.00	TOTAL Liabilities \$	\$0.00
		Net Worth \$	\$0.00

Statement of Financial Condition as of _____, 20____

ANNUAL INCOME	NAME	NAME
Salary		
Commissions		
Dividends		
Interest		
Rentals		
Alimony, Child Support, or		
Other		
TOTAL INCOME	\$0.00	TOTAL INCOME
		\$0.00

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Schedule 1 / Cash, Savings, & Certificates of Deposits

Name of Bank of Financial Institution	How Owned JT, IND, Trust	Type of Account	Account Balance
TOTAL \$			\$0.00

Schedule 2 / Securities Owned or Attach Brokerage Statements

No. of Shares	Description	Registered in Name(s) of	Listed/ Unlisted	Current Market Value
TOTAL \$				\$0.00

Schedule 3 / Life Insurance

Insurance Company	Insured	Beneficiary	Face Value of Policy	Cash Value of Policy	Loans
TOTAL \$			\$0.00	\$0.00	\$0.00

Schedule 4 / Receivables Due To Me on Mortgages and Contracts I Own

Name of Debtor	Description of Property	1st or 2nd Lien	Date of Maturity	Repayment Terms	Balance Due
TOTAL \$					\$0.00

Schedule 5 / Profit Sharing and Pension

Name of Institution	Type of Account	Account Balance	Amount Totaly Vested	Loans
TOTALS \$		\$0.00	\$0.00	\$0.00

Schedule 5 / Retirement Accounts and IRA Accounts

Name of Institution	Type of Account	Account Balance	Amount Totaly Vested	Loans
TOTALS \$		\$0.00	\$0.00	\$0.00

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