



**PERSONAL FINANCIAL STATEMENT**

**PERSONAL FINANCIAL STATEMENT AS OF** \_\_\_\_\_

**Name:** \_\_\_\_\_ **Social Security No.** \_\_\_\_\_

**Home Address:** \_\_\_\_\_

**Home Phone:** \_\_\_\_\_

**Spouse:** \_\_\_\_\_ **Social Security No.** \_\_\_\_\_

***ASSETS***

***LIABILITIES***

**Cash on Hand** \_\_\_\_\_ **Loans Payable** **Monthly** **Balance**

**Stocks and Bonds** \_\_\_\_\_ \_\_\_\_\_

**Loans Receivable** \_\_\_\_\_ \_\_\_\_\_

**Cash Value Insurance** \_\_\_\_\_ \_\_\_\_\_

**Real Estate Owned** \_\_\_\_\_ **Revolving Debt (credit cards etc.)**

**Autos/Boats Total Value** \_\_\_\_\_ **Company** **Monthly** **Balance**

**Other** \_\_\_\_\_ \_\_\_\_\_

\_\_\_\_\_ \_\_\_\_\_

\_\_\_\_\_ \_\_\_\_\_

**Total monthly income** \_\_\_\_\_ **Total monthly expense** \_\_\_\_\_

***TOTAL ASSETS*** \_\_\_\_\_ ***TOTAL LIABILITIES*** \_\_\_\_\_

***NET WORTH*** \_\_\_\_\_

\_\_\_\_\_ **Name** \_\_\_\_\_ **Date** \_\_\_\_\_

The information provided above is accurate as to the best of my knowledge. I understand that any credit approval extended to me is contingent upon the accuracy of the information I have provided.