PERSONAL FINANCIAL STATEMENT

Statement Date: _____

Personal Information

Name:		SSN:	
Address:		Birthdate:	
City, State Zip:		Dependents:	
Home Telephone:		Business Telephone:	

Section I

ASSETS			LIABILITIES		
1	Cash on Hand & in Banks		21	Notes Due to Banks	
2	Cash Value of Life Insurance		22	Notes Due to Relatives & Friends	
3	U.S. Gov. Securities		23	Notes Due to Others	
4	Other Marketable Securities		24	Accounts & Bills Payable	
5	Notes & Accounts Receivable - Good		25	Unpaid Income Taxes Due - Federal State	
6	Other Assets Readily Convertible to Cash - Itemize		26	Other Unpaid Taxes & Interest	
7			27	Loans on Life Insurance Policies	
8			28	Contract Accounts Payable	
9			29	Cash Rent Owed	
10	TOTAL CURRENT ASSETS	$0.00	30	Other Liabilities Due within 1 Year - Itemize	
11	Real Estate Owned		31		
12	Mortgages & Contracts Owned		32		
13	Notes & Accounts Receivable - Doubtful		33	TOTAL CURRENT LIABILITIES	$0.00
14	Notes Due from Relatives & Friends		34	Real Estate Mortgage Payable	
15	Other Securities - Not Readily Marketable		35	Liens & Assessments Payable	
16	Personal Property		36	Other Debts - Itemize	
17	Other Assets - Itemize		37		
18			38	TOTAL LIABILITIES	$0.00
19			39	Net Worth (Total Assets - Total Liabilities)	$0.00
20	TOTAL ASSETS	$0.00	40	TOTAL LIABILITIES & NET WORTH	$0.00

ANNUAL INCOME		ESTIMATE OF ANNUAL EXPENSES	
Salary, Bonuses & Commissions		Income Taxes	
Dividends & Interest		Other Taxes	
Rental & Lease Income (Net)		Insurance Premiums	
Other Income - Itemize		Mortgage Payments	
Other Persons Salary, Bonuses & Commissions		Rent Payable	
Other Income of Other Person - Itemize		Other Expenses	
Total	$0.00	Total	$0.00

GENERAL INFORMATION			CONTINGENT LIABILITIES	
Are any Assets Pledged?	☐ No	☐ Yes	As Endorser, Co-maker or Guarantor- Yes	
Are you a Defendant in any Suits or Legal Actions? (Explain)	☐ No	☐ Yes	On Leases or Contracts	
			Legal Claims	
Have you ever been declared Bankrupt in the last 10 years? (Explain)	☐ No	☐ Yes	Federal - State Income Taxes	
			Other -	

Section II

A. CASH IN BANKS AND NOTES DUE TO BANKS

Name of Bank	Type of Account	Type of Ownership	On Deposit	Notes Due Banks	COLLATERAL (If any) & Type of Ownership
		Cash on Hand			
		TOTALS:	$0.00	$0.00	