

# FINANCIAL STATEMENT

Name(s) \_\_\_\_\_  
 Address \_\_\_\_\_



The following is submitted as being true and accurate statement of the financial condition of the undersigned on the \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_.

| <b>ASSETS</b>                                 |           |              | <b>LIABILITIES</b>                      |      |              |
|---|-----------|--------------|---|------|--------------|
|   |           | Applicant    |   |      | Co-Applicant |
| Cash in Banks                                 |           |              | Notes Payable:                          |      |              |
| Money Markets Funds                           |           |              | To Banks                                |      |              |
| Contract Deposit                              |           |              | To Relative                             |      |              |
| Investments: Bonds & Stocks<br>- see schedule |           |              | To Others                               |      |              |
| Investment in Own Business                    |           |              | Installment Accounts Payable:           |      |              |
| Accounts & Notes Receivable                   |           |              | Automobile                              |      |              |
| Real Estate Owned-see schedule                |           |              | Other                                   |      |              |
| Automobiles:                                  | Year      | Make         | Other Accounts Payable                  |      |              |
| Personal Property & Furniture                 |           |              | Mortgages Payable on Real               |      |              |
| Life Insurance                                |           |              | Estate - see schedule                   |      |              |
| Cash Surrender Value                          |           |              | Unpaid Real Estate Taxes                |      |              |
| Retirement Funds/IRA                          |           |              | Unpaid Income Taxes                     |      |              |
| 401K  |           |              | Chattel Mortgages                       |      |              |
| KEOGH   |           |              | Loans on Life Insurance Policies        |      |              |
| Profit Sharing/Pension Plan                   |           |              | (Include Premium Advances)              |      |              |
| Other Assets                                  |           |              | Outstanding Credit Card Loans           |      |              |
| <b>TOTAL ASSETS</b>                           | \$ -      | \$ -         | <b>TOTAL LIABILITIES</b>                | \$ - | \$ -         |
| <b>COMBINED ASSETS</b>                        |           | \$ -         | <b>NET WORTH</b>                        | \$ - | \$ -         |
| <b>SOURCE OF INCOME</b>                       | Applicant | Co-Applicant | <b>COMBINED</b>                         |      |              |
| Base Salary                                   |           |              | <b>CONTINGENT LIABILITIES</b>           |      |              |
| Overtime Wages                                |           |              | As Endorser or Co-Maker on Notes        |      |              |
| Bonus & Commissions                           |           |              | Alimony                                 |      |              |
| Dividends and Interest Income                 |           |              | Child Support                           |      |              |
| Real Estate Income (Net)                      |           |              | Are you defendant in any legal action?  |      |              |
| Other Income - Itemize                        |           |              | Are there any unsatisfied judgments?    |      |              |
| <b>TOTAL</b>                                  | \$ -      | \$ -         | Have you ever taken bankruptcy? Explain |      |              |
| <b>GENERAL INFORMATION</b>                    | Applicant | Co-Applicant |   |      |              |
| Personal Bank Accounts at                     |           |              | <b>PROJECTED EXPENSES / MONTHLY</b>     |      |              |
|   |           |              | Maintenance                             |      |              |
| Savings & Loan Accounts at                    |           |              | Apartment Financing                     |      |              |
|   |           |              | Other Mortgages                         |      |              |
|   |           |              | Bank Loans                              |      |              |
| Purpose of Loan                               |           |              | Auto Loan                               |      |              |
|   |           |              | <b>TOTAL</b>                            |      |              |
|   |           |              | \$ -                                    |      |              |