Personal Financial Statement

Financial condition as of _____, 20_____

Applicant	Co-Applicant
Name	Name
Street Address	Street Address
City/State/Zip	City/State/Zip
Date of Birth	Date of Birth
Social Security Number	Social Security Number
Telephone (home) (office)	Telephone (home) (office)
Marital Status ☐ Unmarried ☐ Married ☐ Separated	Marital Status ☐ Unmarried ☐ Married ☐ Separated

Assets	$	Liabilities	$
Cash & Certificates of Deposit		Accounts Payable	
Pension & Retirement Accounts		Taxes Payable	
Marketable Securities		Notes & Mortgages Payable	
Notes and Accounts Receivable		Credit Cards	
Cash Value of Life Insurance		Other Liabilities	
Investments Closely Held			
Other Investments			
Residential Real Estate			
Investment Real Estate			
Auto			
Auto			
Other Assets			
		TOTAL LIABILITIES	
		Net Worth (assets minus liabilities)	
TOTAL ASSETS	$	Total Liabilities & Net Worth	$

For the purpose of procuring credit from time to time, I/we furnish the foregoing as a true and accurate statement of my/our financial condition. Authorization is hereby given to the Lender to verify in any manner it deems appropriate any and all items indicated on this statement. In addition, each individual signing below authorizes the Lender to check their individual credit account and employment history and have a credit reporting agency prepare a consumer credit report on them. The undersigned also agrees to notify the Lender immediately in writing of any significant adverse change in such financial condition.

_____ _____

Applicant's Signature Date Co-Applicant's Signature Date