

Personal Financial Statement

As of _____, _____

Complete this form for: (1) each proprietor, or (2) each limited partner who owns 20% or more interest and each general partner, or (3) each stockholder owning 20% or more of voting stock, or (4) any person or entity providing a guaranty on the loan.

Name	Business Phone
Residence Address	Residence Phone
City, State, & Zip Code	
Business Name of Applicant/Borrower	

ASSETS (Omit Cents)	LIABILITIES (Omit Cents)
Cash on hand & in Banks _____ \$ _____	Accounts Payable _____ \$ _____
Savings Accounts _____ \$ _____	Notes Payable to Banks and Others _____ \$ _____ (Describe in Section 2)
IRA or Other Retirement Account _____ \$ _____	Installment Account (Auto) _____ \$ _____ Mo. Payments \$ _____
Accounts & Notes Receivable _____ \$ _____	Installment Account (Other) _____ \$ _____ Mo. Payments \$ _____
Life Insurance-Cash Surrender Value Only _____ \$ _____ (Complete Section 8)	Loan on Life Insurance _____ \$ _____
Stocks and Bonds _____ \$ _____ (Describe in Section 3)	Mortgages on Real Estate _____ \$ _____ (Describe in Section 4)
Real Estate _____ \$ _____ (Describe in Section 4)	Unpaid Taxes _____ \$ _____ (Describe in Section 6)
Automobile-Present Value _____ \$ _____	Other Liabilities _____ \$ _____ (Describe in Section 7)
Other Personal Property _____ \$ _____ (Describe in Section 5)	Total Liabilities _____ \$ _____
Other Assets _____ \$ _____ (Describe in Section 5)	Net Worth _____ \$ _____
Total \$ _____	Total \$ _____

Section 1. Source of Income	Contingent Liabilities
Salary _____ \$ _____	As Endorser or Co-Maker _____ \$ _____
Net Investment Income _____ \$ _____	Legal Claims & Judgments _____ \$ _____
Real Estate Income _____ \$ _____	Provision for Federal Income Tax _____ \$ _____
Other Income (Describe below)* _____ \$ _____	Other Special Debt _____ \$ _____

Description of Other Income in Section 1.

*Alimony or child support payments need not be disclosed in "Other Income" unless it is desired to have such payment counted toward total income.

Section 2. Notes Payable to Banks and Others (Use attachments if necessary. Each attachment must be identified as a part of this statement and be signed.)

Name and Address of Noteholder(s)	Original Balance	Current Balance	Payment Amount	Frequency (monthly, etc.)	How Secured or Endorsed Type of Collateral



Section 3. Stocks and Bonds. (Use attachments if necessary. Each attachment must be identified as a part of this statement and signed).

Number of Shares	Names of Securities	Cost	Market Value Quotation/Exchange	Date of Quotation/Exchange	Total Value

Section 4. Real Estate Owned. (List each parcel separately. Use attachment if necessary. Each attachment must be identified as a part of this statement and signed.)

	Property A	Property B	Property C
Type of Property			
Address			
Date Purchased			
Original Cost			
Present Market Value			
Name & Address of Mortgage Holder			
Mortgage Account Number			
Mortgage Balance			
Amount of Payment per Month/Year			
Status of Mortgage			

Section 5. Other Personal Property and Other Assets. (Describe, and if any is pledged as security, state name and address of lien holder, amount of lien, terms of payment and if delinquent, describe delinquency.)

Section 6. Unpaid Taxes. (Describe in detail, as to type, to whom payable, when due, amount, and to what property, if any, a tax lien attaches.)

Section 7. Other Liabilities. (Describe in detail.)

Section 8. Life Insurance Held. (Give face amount and cash surrender value of policies - name of insurance company and beneficiaries)

Section 9. Credit Check. I hereby give permission to The BOSS Group, and their Consultants, to obtain a record of my credit history.

Signature: _____ Date: _____ Social Security Number: _____ DOB: _____

Signature: _____ Date: _____ Social Security Number: _____ DOB: _____

