



**Personal Financial Statement**  
as of (date) \_\_\_\_\_

Name: \_\_\_\_\_ & \_\_\_\_\_ (spouse)  
Home Address: \_\_\_\_\_ Email: \_\_\_\_\_ Cell # \_\_\_\_\_

For the purpose of inducing M.R. Qualified, LLC and its affiliates (together or individually the "Company") to extend credit to the Undersigned or their affiliates from time to time and intending to be legally bound hereby, Undersigned submits this Personal Statement as being a true and correct statement of Undersigned's financial condition on the above date. Any willful misrepresentation on this Personal Statement could result in civil or criminal liability. Any misrepresentation or omission, whether willful or unknowing, may result in withdrawal of loan commitment(s) and / or default on a loan or contract subsequently written.

ASSETS		LIABILITIES	
Cash balance in banks	\$	Notes payable to banks	\$
Loans receivable from others	\$	Credit card debt	\$
Real estate owned	\$	Loans payable to others	\$
Other personal property	\$	Real estate mortgages payable	\$
Cash surrender value life insurance	\$	Other debts, tax liens, student, etc.	\$
Stocks & bonds	\$	<b>TOTAL LIABILITIES</b>	\$
Retirement accounts	\$	Net worth	\$
<b>TOTAL ASSETS</b>	\$	<b>TOTAL LIABILITIES &amp; NET WORTH</b>	\$

SOURCES OF INCOME (ANNUAL)		PERSONAL INFORMATION	
Salary	\$	Occupation	
Bonus and commissions	\$	Employer	
Dividends and interest	\$	Address	
Real estate income	\$		
Other income (itemize)	\$	Phone Number	
	\$		
<b>TOTAL</b>	\$		

**GENERAL INFORMATION**

Personal Checking Accounts - Name, Address of Bank with Contact Person	
Personal Savings Account - Name, Address of Bank	
Income Taxes settled through what date?	
Are any assets pledged?	

Copy and Attach Additional Pages as Necessary

**SCHEDULE A-STOCKS AND BONDS OWNED**

Brokerage Firm - (Include Retirement Accounts)	In Name of	Market Value
		\$
		\$
		\$
		\$

**SCHEDULE B - REAL ESTATE OWNED**

Address of Property	Date Acquired	Title in Name(s)	Cost	Estimated Current Market Value
A)			\$	\$
B)			\$	\$
C)			\$	\$
D)			\$	\$
E)			\$	\$
F)			\$	\$
G)			\$	\$

**MORTGAGE LOANS**

Name of the Bank	Address of Property	Amount	Balance
A)		\$	\$
B)		\$	\$
C)		\$	\$
D)		\$	\$
E)		\$	\$
F)		\$	\$
G)		\$	\$

**SCHEDULE C - OTHER NOTES PAYABLE**

To Whom Payable	Collateral	Amount	Maturity
		\$	
		\$	

**SCHEDULE D - CASH VALUE LIFE INSURANCE**

Death Benefit	Name of Company	Owner	Beneficiary	Cash Value	Loans
\$				\$	\$
\$				\$	\$
\$				\$	\$

Note: Cash value life insurance has specific cash value that you will receive if you surrender the policy. If you are not sure whether your life insurance has "cash value," it is probably term life insurance with a death benefit only. Do not list term policies here.

**SCHEDULE E - BUSINESS VENTURES**

Venture Name	Address	% Own.	Venture Value	Venture Inc. (prior yr)	Total Bus. Assets	Line of Business
			\$	\$	\$	
			\$	\$	\$	
			\$	\$	\$	

