

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

Name:	&_		(spouse)		
Home Address:		Email:	Cell#		
For the purpose of inducing M.R. Qualithe Undersigned or their affiliates from Personal Statement as being a true and misrepresentation on this Personal Statement whether willful or unknowing, may resubsequently written.	m time to time I correct statem atement could r	and intending to be legally bo ent of Undersigned's financial esult in civil or criminal liabili	ound hereby, Unde condition on the al ty. Any misrepres	ersigned submits this pove date. Any willful entation or omission,	
ASSETS			LIABILITIES		
Cash balance in banks	\$	Notes payable to bank	S	\$	
Loans receivable from others	\$	Credit card debt		\$	
Real estate owned	\$	Loans payable to other	's	\$	
Other personal property	\$	Real estate mortgages	payable	\$	
Cash surrender value life insurance	\$	Other debts, tax liens,	student, etc.	\$	
Stocks & bonds	\$	TOTAL LIABILITIES	TOTAL LIABILITIES		
Retirement accounts	\$	Net worth	Net worth		
TOTAL ASSETS	\$	TOTAL LIABILITIES & I	TOTAL LIABILITIES & NET WORTH		
SOURCES OF INCOME (A	NNUAL)	PERS	ONAL INFORMA	TION	
Salary	\$	Occupation			
Bonus and commissions	\$	Employer			
Dividends and interest	\$	Address			
Real estate income	\$	Address			
Other income (itemize)	\$	Phone Number			
Other income (itemize)	\$	Priorie Nulliber			
TOTAL	\$				
TOTAL	Ψ				
	GEN	ERAL 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
			\$	\$	\$	
			\$	\$	\$	
			\$	\$	\$	

			OTHER INFO	ORM/	ATION			
Are you defendant or plaintiff in any suits or legal actions? (Check One)					Yes □		No □	
Are there any unsatisfied judgments against you? (Check One)					Yes □		No □	
Are you an endorser, co-maker or guarantor on any leases or contracts (other than items expressly listed in the following Schedules B or C)? (Check One)					Yes □		No □	
Have you ever been personally involved in bankruptcy proceedings? (Check One)				Yes □		No □		
Have you ever been convicted for any violation(s) of law, including moving traffic violations? (Check One, exclude non-criminal speeding violations)				Yes  No		No □		
Name of accounta	nt			Nan	ne of attorney			
Accountant's addr	ess			Atto	Attorney address			
Accountant's telephone #			Atto	orney's telephone#				
READ AND IS TRUE INQUIRIES CONCE CREDIT REPORTIN	E AND CC ERNING T IG AGENO RIZED TC	ORRECT. THE UI HE INFORMAT CIES, AS THE CO FURNISH THE	NDERSIGNED EXPI ION APPLIED HERI DMPANY IN ITS DIS IM WITH INFORMA	RESSI EIN, II SCRE <sup>T</sup> ATION	Y AUTHORIZE(S) TH NCLUDING BUT NOT	E COM LIMIT SARY. A VITH TI		r
 Date signed	 Name		Signature		Social Security #	 Da	ate of Birth	
 Date signed	Spouse's	Name	Spouse's Signature	2	Social Security #	— <u> </u>	ate of Birth	