



**Personal Financial Statement**  
**Not to be used for Business Statements**

To induce COMPANY to become surety for the Undersigned, or to accept the Undersigned as Indemnitor, the Undersigned submits the following Financial Statement

Personal financial statement for \_\_\_\_\_ SSN \_\_\_\_\_  
*Name*

\_\_\_\_\_  
*Street Address, City, State, ZIP*

\_\_\_\_\_  
*Name of Spouse* Home Phone No. \_\_\_\_\_ Bus. Phone No. \_\_\_\_\_

As of \_\_\_\_\_  
*Month Day Year*

| CURRENT ASSETS                                      |       | CURRENT LIABILITIES                                |       |
|---|-------|--|-------|
| Cash on hand (not in bank) . . . . .                | _____ | Notes payable to (names & addresses):              | _____ |
| Cash in following banks (names & addresses):        | _____ | .....  | _____ |
| .....   | _____ | .....  | _____ |
| .....   | _____ | Sales Contracts & Chattel Mtgs. (Sch. 6) . . . . . | _____ |
| Stocks and bonds (Schedule 1) . . . . .             | _____ | .....  | _____ |
| Accounts receivable (Schedule 2) . . . . .          | _____ | Accounts payable . . . . .                         | _____ |
| Notes receivable (Schedule 3) . . . . .             | _____ | Current portion of long term debt. . . . .         | _____ |
| Other current assets (Schedule 6)                   | _____ | Other current liabilities (Schedule 6) . . . . .   | _____ |
| .....   | _____ | .....  | _____ |
| .....   | _____ | .....  | _____ |
| .....   | _____ | Current Year's Income Taxes Unpaid . . . . .       | _____ |
| .....   | _____ | Prior Year's Income Taxes Unpaid . . . . .         | _____ |
| .....   | _____ | Real Estate Taxes Unpaid . . . . .                 | _____ |
| .....   | _____ |  |       |
| <b>TOTAL CURRENT ASSETS</b>                         |       | <b>TOTAL CURRENT LIABILITIES</b>                   |       |
| FIXED ASSETS  |       | LONG TERM LIABILITIES                              |       |
| Real estate (Schedule 4):                           |       | Real estate debt (Schedule 4):                     |       |
| Residence . . . . .                                 | _____ | Residence . . . . .                                | _____ |
| Other . . . . .                                     | _____ | Other . . . . .                                    | _____ |
| Cash value of life insurance (Schedule 5) . . . . . | _____ | Borrowed on life insurance (Schedule 5) . . . . .  | _____ |
| Other assets and investments (Schedule 6) . . . . . | _____ | .....  | _____ |
| .....   | _____ | Other long term debt (Schedule 6) . . . . .        | _____ |
| .....   | _____ | .....  | _____ |
| .....   | _____ | .....  | _____ |
| .....   | _____ | <b>TOTAL LONG TERM LIABILITIES</b>                 |       |
| <b>TOTAL FIXED ASSETS</b>                           |       | <b>NET WORTH</b>                                   |       |
| <b>TOTAL ASSETS</b>                                 |       | <b>TOTAL LIABILITIES AND NET WORTH</b>             |       |

Contingent Liabilities

For endorsements or guarantees \$ \_\_\_\_\_ For other purposes \$ \_\_\_\_\_

Give details \_\_\_\_\_

1. STOCKS AND BONDS

| Name of Security | No. Shares | If any pledge, State to Whom and for What Purpose | Div. Paid Last 2 Yrs | Market Value | Book Value |
|------------------|------------|---|----------------------|--------------|------------|
|                  |            |   |                      |              |            |
|                  |            |   |                      |              |            |
|                  |            |   |                      |              |            |
|                  |            |   |                      |              |            |
|                  |            |   |                      |              |            |
| TOTALS           |            |   |                      | \$           | \$         |

2. ACCOUNTS RECEIVABLE

| Name and Address (street and city) From Whom Due | For What is it Due | When Sold | When Due | Amount |
|--|--------------------|-----------|----------|--------|
|  |                    |           |          |        |
|  |                    |           |          |        |
| TOTAL  |                    |           |          | \$     |

3. NOTE RECEIVABLE

| Name and Address (street and city) From Whom Due | For What Due | How Secured | Date | Maturity | Amount |
|--|--------------|-------------|------|----------|--------|
|  |              |             |      |          |        |
|  |              |             |      |          |        |
| TOTAL  |              |             |      |          | \$     |

4. REAL ESTATE

| Description of Property | Title in Name of | Market Value | Cost | Date Acquired | Amount Encumbrance | Monthly Payments | Monthly Income |
|-------------------------|------------------|--------------|------|---------------|--------------------|------------------|----------------|
|                         |                  |              |      |               |                    |                  |                |
|                         |                  |              |      |               |                    |                  |                |
|                         |                  |              |      |               |                    |                  |                |
| TOTAL                   |                  |              |      |               |                    |                  |                |

5. LIFE INSURANCE – CASH VALUE

| Name of Company | Policy Number | Name of Insured | Beneficiary | Face Value | Cash Value | Amount Borrowed |
|-----------------|---------------|-----------------|-------------|------------|------------|-----------------|
|                 |               |                 |             |            |            |                 |
|                 |               |                 |             |            |            |                 |
|                 |               |                 |             |            |            |                 |

6. OTHER ASSETS AND LIABILITIES

| Other Current Assets (itemize) | Other Current Liabilities (itemize) | Amount |
|--------------------------------|-------------------------------------|--------|
|                                |                                     |        |
|                                |                                     |        |
|                                |                                     |        |

The information contained in this statement is provided for the purpose of obtaining, or maintaining credit with you on behalf of the undersigned, or persons, firms or corporations in whose behalf the undersigned may either severally or jointly with other, execute a guaranty in your favor. Each undersigned understands that you are relying on the information provided herein (including the designation made as to ownership of property) in deciding to grant or continue credit. Each undersigned represents and warrants that the information provided is true and complete and that you may consider this statement as continuing to be true and correct until a written notice of a change is given to you by the undersigned. You are authorized to make all inquiries you deem necessary to verify the accuracy of the statements made herein, and to determine my/our credit worthiness. You are authorized to answer questions about your credit experience with me/us.

Signature \_\_\_\_\_

Soc. Sec. No. \_\_\_\_\_ Date of Birth \_\_\_\_\_

Signature \_\_\_\_\_

Soc. Sec. No. \_\_\_\_\_ Date of Birth \_\_\_\_\_

Date Signed \_\_\_\_\_