



Personal Financial Statement

817-596-9998

SECTION 1 - PERSONAL INFORMATION

Primary Information			Spouse Information		
Name	SSN		Name	SSN	
DOB	DL#		DOB	DL#	
Address			Address		
City	ST	ZIP	City	ST	ZIP
Employer			Employer		
Employer's Address			Employer's Address		
Day Phone		Eve Phone	Day Phone		Eve Phone
Email			Email		

SECTION 2 - STATEMENT OF FINANCIAL CONDITION

ASSETS		In Dollars	LIABILITIES		In Dollars
CASH (Complete Schedule A)	Cash on hand/in bank		NOTES PAYABLE (Complete Schedule D)	The Bank	
	Certificates of Dep.			Other Banks	
RETIREMENT FUNDS	IRA Keogh Accounts			Notes Payable to Others	
	Mutual Funds		MORTGAGES PAYABLE (Complete Schedule C)	Homestead	
SECURITIES (Complete Schedule B)	Marketable Securities		Other Real Estate		
	Non-Marketable		REVOLVING CREDIT CARDS		
REAL ESTATE (Complete Schedule C)	Homestead		INCOME TAXES PAYABLE		
	Other Real Estate		AUTOMOBILE DEBT (Complete Schedule D)		
AUTOMOBILES			ALL OTHER LIABILITIES - ITEMIZE		
RESTRICTED OR MARGIN ACCOUNTS					
CASH VALUE LIFE INSURANCE					
Face Value \$					
ACCOUNTS AND NOTES RECEIVABLE					
NET WORTH OF BUSINESS					
HOUSEHOLD & PERSONAL ASSETS					
ALL OTHER ASSETS					
TOTAL ASSETS			TOTAL LIABILITIES		
			NET WORTH		
			TOTAL LIABILITIES & NET WTH		

SECTION 3 - ANNUAL INCOME

Federal Income Tax Info for Year Ended	In Dollars	ANNUAL EXPENDITURES		In Dollars
Salaries & Wages (Individual)		Installment Payments (Auto, Charge Card)		
Salaries & Wages (Spouse)		Lease Obligations		
Bonuses & Commissions		Mortgage/Rental Payments		
Dividends & Interest Income		Other Debt Service		
Net Real Estate Income		Alimony, Child Support, etc.		
Oil & Gas Income/Royalties		Auto, Life, & Health Insurance Premiums		
Other Income - Itemize (Alimony, Child Support, etc.)		Other Obligations - Itemize		
TOTAL INCOME		TOTAL EXPENDITURES		

SECTION 4 - GENERAL INFORMATION

CONTINGENT LIABILITIES	
Do you have any contingent liabilities? <input type="checkbox"/> YES <input type="checkbox"/> NO	
If yes, complete below and include amounts:	
	EST. AMOUNT
As endorser, comaker, or guarantor	
On leases or contracts	
Pending legal action, judgements, or contested tax liens	
TOTAL CONTINGENT LIABILITIES	

Do you have a will?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Have you any judgements against you?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Are you a partner or officer in any other venture? (If Yes, complete SUPPLEMENTAL SCHEDULE)	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Are you a defendant in any suit or legal action?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Are you presently involved in divorce proceedings?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Have you ever taken bankruptcy?	<input type="checkbox"/> YES	<input type="checkbox"/> NO

SCHEDULE A - DEPOSIT RELATIONSHIPS (Cash on Hand/In Bank)

Cash on Hand/In Bank	TYPE OF ACCOUNT	REGISTERED IN NAME OF	BANK	ACCOUNT NO	BALANCE
				TOTAL	
Certificates of Depo	TYPE OF ACCOUNT	REGISTERED IN NAME OF	BANK	ACCOUNT NO	BALANCE
				TOTAL	
					TOTAL CASH

SCHEDULE B - SECURITIES

Marketable Securities	# SHARES	DESCRIPTION	REGISTERED IN NAME OF	EXCHANGE LISTING	PLEGDED?	COST	MKT VALUE
						TOTAL	
Non-Marketable Sec.	# SHARES	DESCRIPTION	REGISTERED IN NAME OF	EXCHANGE LISTING	PLEGDED?	COST	MKT VALUE
						TOTAL	
							TOTAL

SCHEDULE C - REAL ESTATE

PROPERTY DESCRIPTION & LOCATION		YEAR ACQ'D	LIENHOLDER	CURRENT BALANCE	MONTHLY INCOME	MKT VALUE
HOMESTEAD						
PROPERTY DESCRIPTION & LOCATION	% OWNED	YEAR ACQ'D	LIENHOLDER	CURRENT BALANCE	MONTHLY INCOME	MKT VALUE
TOTAL						

SCHEDULE D - NOTES PAYABLE OTHER THAN REAL ESTATE

CREDITOR	ORIGINAL	DATE OF LOAN	MATURITY	COLLATERAL (IF ANY)	MONTHLY PAYMENT/DATE	CURRENT BALANCE
TOTAL						

TERMS AND CONDITIONS

The information contained in this statement and supporting schedules is provided to induce you to extend or to continue the extension of credit to the undersigned or to others upon the guaranty of the undersigned. The undersigned acknowledges and understands that you are relying upon the information provided herein in deciding to grant or continue credit or to accept a guaranty thereof. The undersigned represents, warrants and certifies that the information provided herein is true, correct and complete. The undersigned agrees to notify you immediately and in writing of any changes in name, address, or employment and of any material adverse change (1) in many of the information contained in this statement or (2) in the financial condition of the undersigned or (3) in the ability of the undersigned to perform its obligations to you in the absence of such notice or a new and full written statement. This should be considered as a continuing statement and substantially correct. You are authorized to make all inquiries you deem necessary to verify the accuracy of the information contained herein, and to determine the credit worthiness of the undersigned. The undersigned authorizes you to answer questions about your credit experience with the undersigned.

SIGNED _____



DATE _____

I have read and understand the above paragraph.