

# PERSONAL FINANCIAL STATEMENT

Note: This form is to be used for Personal Financial Statements only. NOT TO BE USED FOR BUSINESS STATEMENTS.

Personal financial statement of \_\_\_\_\_ S.S. NO. \_\_\_\_\_  
 (Name)

\_\_\_\_\_  
 (Street Address, City, State, Zip)

Home Phone No. \_\_\_\_\_ Bus Phone No. (\_\_\_\_) \_\_\_\_\_  
 (Name of wife/husband)

As of \_\_\_\_\_ 20 \_\_\_\_  
 (Date)

<b>ASSETS</b>		<b>LIABILITIES</b>	
Cash in Following Banks (See Schedule I)		Notes Payable (Names/Amounts)	
Bank .....		1. _____	
Bank .....		2. _____	
Bank .....		3. _____	
Stocks/Bonds (See Schedule II)		Auto Loans (See Schedule III)	
Current Market Value.....		Total .....	
Current Market Value.....		Accounts Payable (See Schedule V)	
Current Market Value.....		Total .....	
Automobiles Owned (See Schedule III)		Real Estate (See Schedule IV)	
Cash Value .....		1. Current Debt.....	
Cash Value .....		2. Current Debt.....	
Cash Value .....		3. Current Debt.....	
Real Estate Owned (See Schedule IV)		Taxes	
Current Market Value .....		Current Year Income Taxes Unpaid....	
Current Market Value .....		Prior Years Income Taxes Unpaid.....	
Current Market Value .....		Real Estate Taxes Unpaid.....	
Other Assets (Describe Items/Value)		Other Debts (Names/Amounts)	
_____		1. _____	
_____		2. _____	
_____		3. _____	
<b>TOTAL ASSETS</b>	_____	<b>TOTAL LIABILITIES</b>	_____

### CASH IN BANK

	Name of Bank	Phone	Acct Number	Amount
1	_____	( )	_____	_____
<b>FOR OFFICE USE</b>				
2	_____	( )	_____	_____
<b>FOR OFFICE USE</b>				
3	_____	( )	_____	_____
<b>FOR OFFICE USE</b>				

**II STOCKS AND BONDS**

1	Name of Stock	Broker's Name	Broker's Phone ( )	Book Value	How Many
<b>FOR OFFICE USE</b>					
2	Name of Stock	Broker's Name	Broker's Phone ( )	Book Value	How Many
<b>FOR OFFICE USE</b>					
3	Name of Stock	Broker's Name	Broker's Phone ( )	Book Value	How Many
<b>FOR OFFICE USE</b>					

**III AUTOMOBILES**

Year of Car	Make	Model	Current Value	Amount Owed
Lender (if any)		Lender's Phone ( )	Loan Number	
<b>FOR OFFICE USE</b>				
Year of Car	Make	Model	Current Value	Amount Owed
Lender (if any)		Lender's Phone ( )	Loan Number	
<b>FOR OFFICE USE</b>				
Year of Car	Make	Model	Current Value	Amount Owed
Lender (if any)		Lender's Phone ( )	Loan Number	
<b>FOR OFFICE USE</b>				

**IV REAL ESTATE**

Title Name	Address		Purchase Price
Mortgage Holder	Mortgage Holder's Phone ( )	Loan Number	Mortgage Owning
<b>FOR OFFICE USE</b>			
Title Name	Address		Purchase Price
Mortgage Holder	Mortgage Holder's Phone ( )	Loan Number	Mortgage Owning
<b>FOR OFFICE USE</b>			
Title Name	Address		Purchase Price
Mortgage Holder	Mortgage Holder's Phone ( )	Loan Number	Mortgage Owning
<b>FOR OFFICE USE</b>			

**V ADDITIONAL ASSETS AND LIABILITIES (EXPLAIN)**

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I certify that the information that I have given in this statement is true and correct and intended to be relied upon for purpose of securing bonding.

\_\_\_\_\_ Date \_\_\_\_\_ Principal

Required E-mail: \_\_\_\_\_