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Personal Financial Statement

Name _____ S S # _____

Home Address _____ Phone _____

City, State Zip _____

Spouse's Name (if single, so state) _____ Spouse's S S # _____

Exact Legal Business Name _____

Business Address _____ Phone _____

City, State, Zip _____

Fill all blanks, writing "no" or "none" where necessary to complete information

ASSETS	IN DOLLARS		LIABILITIES	IN DOLLARS	
	Cost	Market		Balances	Payments
Cash in bank	\$	\$	Notes payable - Banks secured	\$	\$
Government and Listed Securities (Schedule A)			Notes payable - Banks unsecured		
Unlisted Securities (Schedule A)			Notes payable - Relatives		
			Notes payable - Others		
Accounts and Note Receivable Trade			Accounts payable		
Relative and Friends			Unpaid income taxes		
Others			Other unpaid taxes and interest		
Cash Value Life Insurance (Schedule C)			Real estate mortgages payable (Schedule B)		
Investment in Business (Show book value in "Cost" col.)			Chattel mortgages and other liens payable		
Real Estate Owned (Schedule B)			Other Debs - Itemize:		
Vested Interest in Deferred Compensation Plans					
Automobile(s)					
Other Personal Property					
Other Assets - Itemize					
			Total Liabilities		
			Net Worth (Cost/Market)		
TOTAL ASSETS	\$	\$	TOTAL LIABILITIES & NET WORTH	\$	\$

Sources of Income:

Salary \$ _____ Dividends \$ _____ Interest \$ _____ Commissions \$ _____
 Real Estate Income \$ _____ Other \$ _____

Contingent Liabilities:

As Endorser, Co-maker or Guarantor \$ _____ on Leases or Contracts \$ _____
 Legal Claims \$ _____ Other _____ \$ _____

General Information:

Defendant in Suits or Legal Action? _____ Please provide details on a separate sheet of paper.
 Assets Pledged or Restricted? _____
 Income taxes settled through what date? _____ Additional Assessments \$ _____

(Complete schedules and sign statement officially on reverse side)

Schedule A

U. S. GOVERNMENT, LISTED AND UNLISTED SECURITIES OWNED

No. of Shares or Par Value of Bonds	Description	In Name of	Market Value
			\$

Schedule B

REAL ESTATE OWNED

Description and location	Date Acquired	Title in Name of	Market Value	Mortgage		Insurance
				Amount	Maturity	
			\$	\$	\$	\$

Schedule C

LIFE INSURANCE

Name of Company	Amount	Cash Value	Loans	Beneficiary
	\$	\$	\$	

NAMES OF BANKS, FINANCE COMPANIES OR OTHER SOURCES WHERE CREDIT HAS BEEN OBTAINED

Name	Date	High Credit	Basis
		\$	

The undersigned certifies that both sides hereof and the information inserted therein has been carefully read and is true and correct.

Signature

Date

Signature

Date