

## PERSONAL NET WORTH STATEMENT

Complete a form for: (1) each socially disadvantaged proprietor, or (2) each socially disadvantaged limited and general partner whose combined interest total 51% or more, or (3) each socially disadvantaged stockholder owning 51% or more of voting stock. An individual's personal net worth includes only his or her share of the assets held jointly or as community property with the individual's spouse.

Name:	Date:
Residence Address:	Residence Phone:
City, State & Zip Code:	
Business Name:	Residence Phone:

### PERSONAL FINANCIAL STATEMENT

As of \_\_\_\_/\_\_\_\_/\_\_\_\_. In determining net worth, EXCLUDE individual ownership interest in the applicant business and personal residence. If married use only ½ of marital assets. Round all numbers to the nearest dollar.

ASSETS	LIABILITIES
Cash on hand and in bank      \$ _____	Accounts Payable      \$ _____
Savings Accounts      \$ _____	Notes Payable to Banks and Others      \$ _____ (Complete Section 1)
IRA or Other Retirement Account      \$ _____	Installment Account (Auto)      \$ _____
Accounts and Notes Receivable      \$ _____	Installment Account (Other)      \$ _____
Life Insurance - Cash Surrender Value Only      \$ _____ (Complete Section 7)	Loan on Life Insurance      \$ _____
Stocks and Bonds      \$ _____ (Complete Section 2)	Mortgages on Real Estate [Except for personal residence]      \$ _____ (Complete Section 3)
Real Estate [Except for personal residence]      \$ _____ (Complete Section 3)	Unpaid Taxes      \$ _____ (Complete Section 5)
Automobile(s) – Present Value      \$ _____	Other Liabilities      \$ _____ (Complete Section 6)
Other Personal Property      \$ _____ (Complete Section 4)	<b>Total Liabilities</b> \$ _____
Other Assets      \$ _____ (Complete Section 4)	<b>Net Worth</b> \$ _____ <b>(Total Assets minus Total Liabilities)</b>
<b>Total Assets</b> \$ _____	
Other Source of Income:	Other Contingent Liabilities:
Salary/Commissions      \$ _____	As Endorser or Co-worker      \$ _____
Net Investment Income      \$ _____	Legal Claims and/or Judgments      \$ _____