

PERSONAL FINANCIAL STATEMENT AS OF _____

Date

SUBMITTED TO: _____

PERSONAL INFORMATION							
APPLICANT (NAME)				CO-APPLICANT (NAME)			
Employer				Employer			
Address of Employer				Address of Employer			
Business Phone No.	No. of Years with Employer	Title/Position		Business Phone No.	No. of Years with Employer	Title/Position	
Name of previous employer & position (if with current employer less than 3 yrs.)			No. of Yrs.	Name of previous employer & position (if with current employer less than 3 yrs.)			No. of Yrs.
Home Address				Home Address			
Home Phone No.	Social Security No.		Date of Birth	Home Phone No.	Social Security No.		Date of Birth
Name, Phone No. of your Accountant				Name, Phone No. of your Accountant			
Name, Phone No. of your Attorney				Name, Phone No. of your Attorney			
Name, Phone No. of your Investment Advisor/Broker				Name, Phone No. of your Investment Advisor/Broker			
Name, Phone No. of your Insurance Advisor				Name, Phone No. of your Insurance Advisor			

Cash Income & Expenditures Statement For Year Ended _____ (Omit cents)

ANNUAL INCOME	AMOUNT (\$)	ANNUAL EXPENDITURES	AMOUNT (\$)
Salary (applicant)	\$	Federal Income and Other Taxes	\$
Salary (co-applicant)		State Income and Other Taxes	
Bonuses & Commissions (applicant)		Property Taxes	
Bonuses & Commissions (co-applicant)		Mortgage Principal Residential Investment	
Rental Income		Mortgage Interest Residential Investment	
Interest Income		Installment Debt and Revolving Credit Card Debt	
Dividend Income		Insurance (car, life, health, home)	
Capital Gains		Investments <small>(including tax shelters, pensions, and non-deductable retirement payments)</small>	
Business / Partnership Income		IRA and other deductible retirement pmts.	
Other Investment Income		Tuition / Child Support / Daycare	
Other Income (List)* *		Other Living Expense <small>(gas, food, clothing, utilities, alimony, etc.)</small>	
Social Security Income		Medical and Dental Expenses	
Pension Income		Other Expense (List)	
TOTAL INCOME ►	\$ 0	TOTAL EXPENDITURES ►	\$ 0

Any significant changes expected in the next 12 months? ☐ Yes ☐ No (If yes, attach information.)

** Income from alimony, child support, or separate maintenance income need not be revealed if the applicant or co-applicant does not wish to have it considered as a basis for repaying this obligation.