

PERSONAL FINANCIAL STATEMENT

As of Date: _____

PERSONAL INFORMATION

Full Name:

Address:

City, State, Zip:

Co-Applicant Name:

Phone Number:

Email Address:

FINANCIAL POSITION (ASSETS & LIABILITIES)

Assets	Value (\$)
Cash (Checking & Savings Accounts)	-----
Retirement Accounts (IRA, 401k, etc.)	-----
Real Estate (Primary Residence)	-----
Other Real Estate Holdings	-----
Stocks, Bonds, & Mutual Funds	-----
Vehicles (Car, Boat, RV, etc.)	-----
Personal Property (Value of Goods)	-----
Other Assets (Describe: _____)	-----
TOTAL ASSETS (A)	-----

Liabilities	Value (\$)
Credit Card Balances	-----
Mortgage on Primary Residence	-----
Other Real Estate Mortgages	-----
Auto Loans	-----
Student Loans	-----
Personal Loans / Lines of Credit	-----

Liabilities	Value (\$)
Unpaid Taxes / Other Assessments	-----
Other Liabilities (Describe: _____)	-----
TOTAL LIABILITIES (B)	-----

NET WORTH (Total Assets [A] minus Total Liabilities [B])	-----
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ANNUAL INCOME & EXPENDITURES SOURCE

Annual Income	Amount (\$)
Salary (Primary Applicant)	-----
Salary (Co-Applicant)	-----
Bonuses, Commissions, & Tips	-----
Real Estate / Rental Income	-----
Dividends & Interest	-----
Other Income	-----
TOTAL ANNUAL INCOME	-----

Annual Expenditures	Amount (\$)
Mortgage Payments / Rent	-----
Property Taxes & Insurance	-----
Auto Loan Payments	-----
Credit Card / Debt Service	-----
Living Expenses (Food, Utilities, etc.)	-----
Other Expenditures	-----
TOTAL ANNUAL EXPENDITURES	-----

Applicant Signature

Date

Co-Applicant Signature

Date

