

## CONFIDENTIAL PERSONAL FINANCIAL STATEMENT

As of:

		APF	PLICANT			
Name- First, Middle Initial, Last		Social Secu	rity Number			
Date of Birth	Primary Phone #		☐ Hor	me 🗌 Cell	Email Address	
Address- Number, Street, City, State, Z	ip Code					# of Years There
Employer			# 0	of Years There	Business Phor	ne #
Business Address- Number, Street, City	y, State, Zip Code					
Individual- assets are individual					-	fill in following section.
	JOINT A	ASSET H	OLDER,	if applicable	9	
Name- First, Middle Initial, Last		Social Secu	rity Number			
Date of Birth	Primary Phone #		Hor	me 🗌 Cell	Email Address	
Address- Number, Street, City, State, Z	lip Code					# of Years There
Employer			# 0	of Years There	Business Phon	ne #
Business Address- Number, Street, City	y, State, Zip Code					
		NCOME	STATEM	IFNT		
Annual Income:	ı	NCOME App	STATEM		nt, if applicable	Total
Annual Income: Gross Salary					nt, if applicable	Total
					nt, if applicable	Total
Gross Salary					nt, if applicable	Total
Gross Salary Bonus & Commissions					nt, if applicable	Total
Gross Salary Bonus & Commissions Dividends & Interest					nt, if applicable	Total
Gross Salary Bonus & Commissions Dividends & Interest Alimony, Child Support, Maintenand					nt, if applicable	Total
Gross Salary Bonus & Commissions Dividends & Interest Alimony, Child Support, Maintenan- Rental Income					nt, if applicable	Total
Gross Salary Bonus & Commissions Dividends & Interest Alimony, Child Support, Maintenan- Rental Income	ce*	App	olicant	Join		
Gross Salary Bonus & Commissions Dividends & Interest Alimony, Child Support, Maintenand Rental Income Other (describe):	ce*	Ард	olicant	Join		
Gross Salary Bonus & Commissions Dividends & Interest Alimony, Child Support, Maintenand Rental Income Other (describe):	ce*  naintenance payments nee  PE	App	uded, unless	Join		
Gross Salary Bonus & Commissions Dividends & Interest Alimony, Child Support, Maintenand Rental Income Other (describe):  * Alimony, child support or separate maintenance  Are you an endorser, co-maker	naintenance payments nee  PE  r or guarantor on any rest? If so, describe.	App  App  RSONAL  obligation	uded, unless	Join		
Gross Salary Bonus & Commissions Dividends & Interest Alimony, Child Support, Maintenand Rental Income Other (describe):  * Alimony, child support or separate maintenance of a closely held business interest.  Are you obligated to pay alimonal communications and the second communications are separated to the second communication of the s	naintenance payments nee  PE  r or guarantor on any rest? If so, describe.  ny, child support or so	Appended not be included not b	uded, unless	Join		

## BALANCE SHEET (complete additional schedules as needed) **Dollars** Assets: Cash and Short Term Investments (Sch A) 1 Marketable Securities (Stocks, Bonds, Mutual Funds) (Sch B) 2 Cash Value of Life Insurance (Sch C) 3 4 Notes and Accounts Receivable Securities not Readily Marketable (Sch D) 5 Real Estate Owned (Sch E) 6 Retirement Accounts (Deferred Comp, Profit Sharing, IRA's) 8 Interest in Closely Held Businesses- Equity (Sch F) Automobiles 9 Personal Property 10 11 Agricultural Assets- Equity (see farm addendum) Other Assets (describe): Total Assets Liabilities: 13 Outstanding Credit Card Balances 14 Notes Payable to Banks (Sch G) 15 Other Payables- Retirement Acct, Margin Acct, Individuals (Sch H) 16 Real Estate Mortgages (Sch E) 17 Taxes Payable 18 Other Liabilities (describe): **Total Liabilities**

Net Worth (Total Assets minus Total Liabilities)

Schedule A- Cash & Short Term Investments								
Name of Institution	Checking	Savings		CD's	Other	Total		
				Total	(Place on Line 1)			

	Sched	lule B- Mark	etable Securit	ies	
Description	# of Shares or Par Value of Bonds	L- Listed; U- Unlisted	P- Pledged; R- Restricted	Cost	Market Value
			To	otal (Place on Line 2)	

Schedule C- Life Insurance									
Name of Company	Owner	Beneficiary	Face Amount	Cash Value	Loans, if any				
		Total	(Place on Line 3)						

	Schedule	D- Securities	Not	Readily Mark	ketable	Э		
		P- Pledged	-	·				
Description	# of Shares	R- restricte	ed	Cos	st		Ma	arket Value
			-					
	L	·		Total (Place	on Line	e <i>5</i> )		
	Sc	chedule E- Re	al Es					
				ai Estate Owned				
Description	Titled in the Name	Market Value		Mortgage Balance		Monthly Payment		Monthly Rental Income, if applicable
Description	OI OI	iwarket van	ie .	Balance		Payment		income, ii applicable
		+						
-								
Totals (Value on Line 6 & Mtg Bal o	on Line 16)							
Schedule F- I	nterest in Close	elv Held Busine	esses	s (Partnershi	ps. S-	Corpo	rations, LLC	C's)
		,		Outstanding	Conti	ngent	N	let Equity
Name of Company	% Ownership	Fair Market Value		Debt(s) of Company	Liabil ()		•	t(s) multiplied by % wnership)
Name of Company	// Ownership	raii Warket Value	+	Company	()	<b>\</b> )	0	whership)
				Total (Place	on Line	e <i>8)</i>		
	Sche	edule G- Note	s Pay	able to Banl	<s< td=""><td></td><td></td><td></td></s<>			
	S- Secured;					Ot	utstanding	Monthly
Name of Institution	U- Unsecured	d Collatera		l, if applicable				
or mondion	0- Oliseculeu	Collai	erai, ii	applicable			Balance	Payment
	0- Oliseculeu	Collai	ciai, ii	applicable			Balance	Payment
or monday:	0- onsecured	Conai	erai, ii	applicable			Balance	Payment
	o- onsecureu	Collat	erai, ii	applicable			Balance	Payment
or monday:	o- onsecureu	Conat			ne 14)		Balance	Payment
o, mondron			Tota	al (Place on Lin	ne 14)		Balance	Payment
		Schedule H- (	Tota	al (Place on Lin	ne 14)			
Payable to		Schedule H- (	<i>Tot</i> e	al (Place on Lin	ne 14)	Ou	utstanding Balance	Payment  Monthly Payment
	S- Secured;	Schedule H- (	<i>Tot</i> e	al (Place on Lir. Payables	ne 14)	Ou	utstanding	Monthly
	S- Secured;	Schedule H- (	<i>Tot</i> e	al (Place on Lir. Payables	ne 14)	Ou	utstanding	Monthly
	S- Secured;	Schedule H- (	Tota Other eral, if	al (Place on Lir. Payables applicable		Ou	utstanding	Monthly
	S- Secured;	Schedule H- (	Tota Other eral, if	al (Place on Lir. Payables		Ou	utstanding	Monthly
	S- Secured;	Schedule H- (	Tota Other eral, if	al (Place on Lir. Payables applicable		Ou	utstanding	Monthly
Payable to  SENT. Because of your relationship to	S- Secured; U- Unsecured	Schedule H- ( Collate  Courrole in the acco	Tota Other eral, if	al (Place on Line) Payables applicable al (Place on Line)	ne 15)	Ou onal crec	utstanding Balance	Monthly Payment
Payable to	S- Secured; U- Unsecured	Schedule H- ( Collate  Courrole in the acco	Tota Other eral, if	al (Place on Line) Payables applicable al (Place on Line)	ne 15)	Ou onal crec	utstanding Balance	Monthly Payment
Payable to  SENT. Because of your relationship to	S- Secured; U- Unsecured  a loan applicant or your an. By signing below	Schedule H- ( Collate  cour role in the account, I authorize the final	Tota  Tota	al (Place on Line) Payables applicable al (Place on Line) attion for a loan, you	ne 15)  Dur person a cons	Ou onal cred umer cre	utstanding Balance ditworthiness is a	Monthly Payment  a factor in the evaluation at purpose.
Payable to  NSENT. Because of your relationship to be application or accommodation for a load NATURE(S). If We hereby affirm that the cated and is true, complete and correct.	S- Secured; U- Unsecured  a loan applicant or yean. By signing below e foregoing information of the company of	Schedule H- ( Collate  Collate  our role in the account, I authorize the fination contained in this ider is relying on this	Tota  Tota  Tota  Tota  financial in	al (Place on Line) Payables applicable  al (Place on Line) ation for a loan, your action to obtain the control of the control of my finance of	ne 15)  our person a cons resentecial cond	Out on all crecumer credit for the ition for	ditworthiness is a edit report for the purpose of obtain the purpose of si	Monthly Payment  I factor in the evaluation at purpose.  Ining credit as of the dat upporting credit
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