

**Personal Financial Statement as of \_\_\_\_\_**

Applicant (Name)			
Home Address			
Home Phone #	D.O.B.	Social Security #	Driver's License #
Employer			
Address of Employer			
Business Phone #	Number of Years with Employer	Occupation	Title/Position
Name of Accountant	Name of Attorney	Name of Investment Advisor	Name of Insurance Provider
Phone #	Phone #	Phone #	Phone #

**Section A: Cash and Securities**

Account Location	Contact	Value	As of Date

Section B: Real Estate Assets						
Type of Real Estate	Location	Value	Purchase Price	Debt	Equity	Percent Ownership

Please Attach Any Information in Relation to Assets to Exhibit B (Appraisals, etc.)

Section C: Ownership Interests							
Name of Business	Public or Private	Percent Ownershi	Management (Y/N)	Purchase Price	Current Value	Debt	Equity

Please Attach Any Information in Relation to Ownership Interests to Exhibit C Including Organizational Chart

Section D: Income		Section E: Expenditures	
Annual Income	Amount (\$)	Annual Expenditures	Amount (\$)
Salary		Federal Income Taxes	
Commissions		State Income Taxes	
Bonuses		Other Income Taxes	
Rental Income		Rent Payments	
Interest Income		Mortgage Payments	
Dividend Income		Property Taxes	
Capital Gains		Loan Payments	
Investment Income		Investments	
Other Income		Other Living Expenses	
<b>Total Income</b>		<b>Total Expenditures</b>	

Please Attach Any Information in Regards to Income and Expenditures to Exhibits D & E Respectively Including Most Recent 1040

# Exhibit A

## Exhibit B

## Exhibit C

## Exhibit D