

Personal Financial Statement

Business Loan Applicant Financial Profile

Directions: Please complete this statement as of a recent date. Do not leave any spaces blank; write "N/A" if an item does not apply to you.

1. Personal Information

Full Name:	<input type="text"/>	Co-Applicant Name (if joint):	<input type="text"/>
Street Address:	<input type="text"/>	Phone Number:	<input type="text"/>
City, State, Zip:	<input type="text"/>	Email Address:	<input type="text"/>
Associated Business Name:	<input type="text"/>	Statement Date:	<input type="text" value="MM/DD/YYYY"/>

2. Financial Statement (Assets & Liabilities)

Assets (What You Own)	Liabilities (What You Owe)
Cash on Hand & in Banks (\$): <input type="text"/>	Accounts Payable (\$): <input type="text"/>
Savings Accounts (\$): <input type="text"/>	Notes Payable to Banks / Others (\$): <input type="text"/>
IRA / Retirement Accounts (\$): <input type="text"/>	Installment Accounts (Auto) (\$): <input type="text"/>
Accounts & Notes Receivable (\$): <input type="text"/>	Installment Accounts (Other) (\$): <input type="text"/>
Life Insurance (Cash Surrender Value) (\$): <input type="text"/>	Mortgages on Real Estate (\$): <input type="text"/>
Stocks and Bonds (\$): <input type="text"/>	Unpaid Taxes (\$): <input type="text"/>
Real Estate (Primary Residence) (\$): <input type="text"/>	Other Liabilities (\$): <input type="text"/>
Other Real Estate (\$): <input type="text"/>	TOTAL LIABILITIES (\$): <input type="text"/>
Other Personal Assets (\$): <input type="text"/>	
TOTAL ASSETS (\$): <input type="text"/>	NET WORTH (Assets minus Liabilities) (\$): <input type="text"/>

3. Annual Sources of Income

Base Salary (\$):	<input type="text"/>	Net Real Estate Income (\$):	<input type="text"/>
Bonuses & Commissions (\$):	<input type="text"/>	Other Income (\$):	<input type="text"/>
Dividends & Interest (\$):	<input type="text"/>	Total Annual Income (\$):	<input type="text"/>

4. Contingent Liabilities

As Endorser or Co-Maker (\$): Legal Claims or Judgments (\$):
Letters of Credit or Guarantees (\$): Provision for Federal Income Tax (\$):

5. Real Estate Owned (Details)

Property Address / Type	Year Purchased	Original Cost (\$)	Current Market Value (\$)	Mortgage Balance (\$)	Monthly Payment (\$)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

6. Authorization & Signatures

The undersigned certifies that the information provided in this Personal Financial Statement is true, correct, and complete. The lender is authorized to make all inquiries deemed necessary to verify the accuracy of the statements made herein and to determine the creditworthiness of the undersigned.

Applicant Signature:

Date:

Co-Applicant Signature (if applicable):

Date: