Personal Financial Statement

As of

Complete this form for : (1) each proprietor, or (2) each limited partner who owns 20% or more interest and each general partner, or (3) each stockholder owning 20% or more of voting stock and each corporate officer and director, or (4) any other person or entity providing a guaranty on the loan.

Name		
Business Phone:	Residence Phone:	
Residence Address:		
Business Name of		
Applicant/Borrower		

Assets

Assets	Liabilities	
Cash in Banks	\$ Accounts Payable Describe in Section 2	\$
Savings in Banks	\$ Notes Payable Describe in Section 2	\$
IRA / Retirement	\$ Installment Loans Describe in Section 2	\$
Cash Value Of Life Insurance Complete Section 8	\$ Other Loans Describe in Section 2	\$
Stocks & Bonds Describe in Section 3	\$ Real Est. Loans Describe in Section 4	\$
Real Estate Owned Describe in Section 4	\$ Other Liabilities Describe in Section 7	\$
Automobile – Present Value	\$ Unpaid Taxes Describe in Section 6	\$
Other Assets & Property Describe in Section 5	\$ Total Liabilities	\$
Total Assets	\$ Net Worth +EqualsTotal	\$
Section 1		

Salary	\$
Net Investment Income	\$
Real Estate Income	\$
Other Income	\$ Describe other income:

Section 2 Notes Payable to Bank and Others (use attachment A if necessary)

Name and address of Note Holder	Original Balance	Current Balance	Payment Amount	Frequency Monthly Etc	How Secured or Endorsed Type of Collateral

Personal Financial Statement Page 2.

Section 3 Stocks and Bonds (use attachments if necessary)

Section 5 Stocks and Bonds (use attachments in necessary)					
Number of Shares	Name of securities	Cost	Market Value Quotation/Exch.	Date of Quote	Total Value

Section 4 Real Estate Owned (List Each Parcel Separately. Use attachments if necessary.)

	Property A	Property B	Property C
Type of Property			
Address of Property			
Name and address of Title Holder			
Date Purchased			
Original Cost			
Present Market Value			
Name and Address of Mortgage Holder			
Mortgage Account Number			
Mortgage Balance			
Monthly Payment			
Status of Mortgage			

Section 5 Other Personal Property and Other Assets (describe, if any is pledged as security, state name and address of lien holder amount of lien, terms of payment, and if delinquent, describe delinquency)

Section 6 Unpaid Taxes (describe in detail, as to type, to whom payable, when due, amount and to what property if any, a lien attaches)

Section 7 Other Liabilities (describe in detail)

Section 8 Life insurance Held (give face amount and cash surrender value of policies – name of insurance company and beneficiaries).

I authorize Lender/SBA to make inquiries as necessary to verify the accuracy of the statements made and to determine my credit worthiness. I certify the above and the statements contained in the attachments are true and accurate as of the stated date(s). These statements are made for the purpose of either obtaining a loan or guaranteeing a loan. I understand FALSE statements may result in forfeiture of benefits and possible prosecution by the U.S. Attorney General (reference 18 U.S.C 1001).

Signature	Date	SSN:
Signature	Date	SSN:

Please note: The estimated average burden hours for this completion of the form is 1.5 hours per response. If you have any question or comments concerning this estimated or any other aspect of this information, please contact Chief Administrative Branch US small Business administration, Washington DC 20416 and clearance office, Paper Reduction Project (3245-0188), Office of Management and Budget. Washington, DC 20503