



Personal Financial Statement

<i>Personal Information</i>		
Full Name		
Home Phone	Business Phone	Cell Phone
Email		
Street Address		
Date of Birth	Marital Status	
Spouse's Name	Spouse's Occupation	Total dependants
General Health	Are you a US Citizen?	If no, what country?
Do you own your own home?	How long?	Former residence
Professional Experience		
Company 1	Position	Years Employed
Describe Responsibilities		
Company 2	Position	Years Employed
Describe Responsibilities		
Company 3	Position	Years Employed
Describe Responsibilities		
General		
Would you plan to spend full time in this business? If no, please explain your other obligations		
Have you ever failed in business or compromised with creditors? If yes, please explain		

Schedule B: Stocks and Bonds (Attach additional sheets if necessary)				
<i>Number of Shares</i>	<i>Name of Securities</i>	<i>Cost</i>	<i>Current Market Value</i>	<i>Total Value</i>
TOTAL				

Schedule C: Real Estate Owned (Attach additional sheets if necessary)			
	<i>Property # 1</i>	<i>Property # 2</i>	<i>Property # 3</i>
Name & Address of Mortgage Holder			
Address of Property			
Type of Property			
Date Purchased			
Mortgage Balance			
Monthly Payment			
Original Cost			
Current Market Value			

Schedule D: Unpaid Taxes. Describe the type, to whom payable, amount, and when due.		
<i>Name of Institution</i>	<i>Type of Tax</i>	<i>Amount Owed</i>
TOTAL		

Schedule E: Life Insurance Carried				
<i>Name of Company</i>	<i>Face Amount</i>	<i>Cash Surrender Value</i>	<i>Loans</i>	<i>Beneficiary</i>
TOTAL				

Schedule F: IRA or Other Retirement Accounts	
<i>Type of Account</i>	<i>Current Balance</i>
TOTAL	

