

# Personal Financial Statement

Answer all questions using "no" or "none" where necessary.  
Please begin by completing schedules on reverse side.

TO THE ATTENTION OF:

Please fill in name above



Personal Information		Date of statement
Name (first, middle, last)	Birthdate	Social security number
Home address (include apt.)	City, State, Zip	How long?
Phone number	Fax number	E-mail address
Business/Employer	Title/Position	How long?
Business address	City, State, Zip	Phone number
Do you have any dependents? If yes, list ages	Do you have a will? If yes, name of executor	
Have you ever taken bankruptcy? If yes, explain	Are you a defendant in any suits or legal actions?	
Joint statement, list names of individuals whose assets, liabilities and income are included		
Present Landlord (if applicable) Address & Phone number		
Assets		Liabilities
Cash, on hand and unrestricted in banks from below	\$	Notes payable to banks
		Schedule 1
Accounts/Notes-receivable	\$	Notes and accounts due others
Schedule 2	\$	Schedule 1
Cash surrender value life insurance. (Do not deduct loans)	\$	Loan(s) against life insurance
Schedule 3	\$	Schedule 3
Listed (AMEX, NYSE) stocks, bonds, US Govt. Securities	\$	Brokers margin accounts
Schedule 4	\$	
Other stocks and bonds	\$	Taxes accrued but unpaid
Schedule 4	\$	
Real Estate at cost or market value	\$	Mortgages payable on real estate
Schedule 5	\$	Schedule 5
Automobiles	\$	
	\$	
	\$	
Other assets - itemize	\$	Other liabilities - itemize
	\$	
	\$	
	\$	
	\$	
<b>Total Assets</b>	<b>\$</b>	<b>Total Liabilities</b>
		<b>\$</b>
Net Worth		
Subtract your total liabilities from total assets and enter figure to right		
Contingent Liabilities		
As guarantor or co-maker, legal claims on leases or contracts		
Income Information		Banking Relationships
Alimony, child support or separate maintenance income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation		
	Monthly - Annual	Name and address of bank
Salary (Gross)	\$	Single (S) Joint (J) Trust (T)
Bonus and commissions, dividends, interest	\$	Cash Balance
Rental Income	\$	\$
Other - itemize	\$	\$
	\$	\$
<b>Total Income</b>	<b>\$</b>	<b>Total Cash (list in Assets above)</b>
		<b>\$</b>

I warrant that there is no judgment against me nor lien unsatisfied upon my property except as shown, nor prior suit pending against me in any court, that no assets are pledged in any manner not shown herein, and that this statement is true and complete and is offered for the purpose of obtaining credit. Selig Enterprises, Inc. is authorized to check my (our) credit and employment history, and to answer questions about its credit experience with me (us). With joint credit, all applicants must sign.

Date \_\_\_\_\_ Signature \_\_\_\_\_ (Seal)

Date \_\_\_\_\_ Signature \_\_\_\_\_ (Seal)

Please Complete Schedules on Reverse Side

# Supplementary Schedules (Take totals to front)

Attach additional pages if necessary

<b>Schedule 1 Debts/Credit Lines</b> (Include home equity and any other open-end revolving credit, even if unused)					
Name and address of bank	Endorsement or collateral (describe)	Credit line	Original amount	Unpaid balance	Monthly payment
			\$	\$	\$
			\$	\$	\$
			\$	\$	\$
		Total	\$	\$	\$
Name and address of others			\$	\$	\$
			\$	\$	\$
			\$	\$	\$
			\$	\$	\$
		Total	\$	\$	\$

<b>Schedule 2 Accounts, Loans, and Notes Receivable</b>					
Name and address of debtor	Maturity date	Amount owing	Description or nature of debt	Description of security held	Repayment terms
		\$			
		\$			
		\$			
		Total	\$		

<b>Schedule 3 Life Insurance</b>								
Name of insured	Beneficiary	Insurance Co.	Face amount of policy	Surrender value	Loans against policy	Yearly premium	Type of policy	Is policy assigned?
			\$	\$	\$	\$		
			\$	\$	\$	\$		
		Total	\$	\$	\$	\$		

<b>Schedule 4 Stocks, Bonds and US Government Securities</b>						
Description of Security	Registered in name of	Face value (bonds) No of shares (stocks)	Market value/share	Total market value	Pledged Yes/No	Listed (L) on NYSE, AMEX Unlisted (U) Government Security (G)
			\$	\$		
			\$	\$		
			\$	\$		
			\$	\$		
		Total Listed		\$		
		Total Unlisted		\$		

<b>Schedule 5 Real Estate</b>								
Description or address to include city and state	Title in name of	Date acquired	Cost	Market value	Tax value	Original amount	Unpaid balance	Monthly payment
			\$	\$	\$	\$	\$	\$
			\$	\$	\$	\$	\$	\$
			\$	\$	\$	\$	\$	\$
		Total	\$	\$	\$	\$	\$	\$

<b>Previous Credit References</b>					
Name and address	List names of banks, finance companies or other concerns where credit has been obtained	Date	Account number	Type of account	High credit