

Personal Financial Statement

as of _____

NAME

RESIDENTIAL PHONE

ADDRESS

BUSINESS PHONE

CITY

BUSINESS NAME

<u>Assets</u>	<u>Dollars</u>
Cash	\$
<i>Savings</i>	\$
<i>IRA/Retirement</i>	\$
Marketable Stocks / Bonds	\$
<i>Life Ins. Cash Surrender Value</i>	\$
<i>Real Estate – Residence</i>	\$
<i>Real Estate – Other</i>	\$
<i>Personal Property</i>	\$
<i>Automobiles</i>	\$
<i>Other (list)</i>	\$
	\$
	\$
	\$
	\$
	\$
	\$
<i>Total Assets</i>	\$

<u>Liabilities</u>	<u>Dollars</u>
Taxes Payable	\$
<i>Credit Cards</i>	\$
<i>Automobile Loans</i>	\$
Unsecured Notes / Obligations	\$
<i>Life Ins. Policy Loans</i>	\$
<i>Mortgages, Residence</i>	\$
<i>Mortgages Other</i>	\$
<i>Other (list)</i>	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
<i>Total Liabilities</i>	\$
Net Worth	\$
<i>Total</i>	\$

Income

Annual Salary	\$
Bonus / Commissions	\$
<i>Real Estate Income</i>	\$
<i>Other (list)</i>	\$
	\$
	\$
	\$
<i>Total Annual Income</i>	\$

SBA Information

Would consider using the Small Business Administration to assist in the purchase of a qualified business?

Yes / No

Have you ever applied for an SBA loan

Yes / No

If yes were you successful?

Yes / No

Signature

ALL INFORMATION WILL BE KEPT CONFIDENTIAL