



Personal Financial Statement

NAME _____

_____ AS AT _____ 20_____
(Applicant & Spouse) (Full names including middle initials)

ADDRESS _____

NOTE: COMPLETE REVERSE SIDE FIRST AND TRANSFER AMOUNTS BELOW

ASSETS

Cash on Hand or in Bank	A	
Marketable Stocks & Bonds	B	
Accounts Receivable	C	
Other Liquid Assets		
TOTAL LIQUID ASSETS		
Real Estate	D	
Mortgages Receivable	E	
Furniture and Effects (Estimate Value)		
Equipment, Cars, Boats	F	
Other Assets (Private Co's, Shares & Loans)	G	
TOTAL		

LIABILITIES

Due to Bank	A	
Accounts Payable	C	
Other accounts payable during Present Year (interest & taxes)		
TOTAL CURRENT LIABILITIES		
Due on Real Estate	D	
Due on Equipment, Cars, Boats	F	
Other Liabilities Payable Beyond Present Year	G	
NET WORTH		
TOTAL		

QUESTIONNAIRE

1. Total Personal Income all Sources Last Year _____
2. Describe any Contingent Liabilities (Endorser, Guarantor, etc.)

3. Have you ever failed in business or compromised with creditors?

4. Lines of Business in which you are engaged _____

5. Bank loan, terms of repayment _____

6. Fire Insurance:

Amount	Real Estate	Name of Company

7. Life Insurance:

Amount	Beneficiary	Name of Company	Cash Surrender Value

Attach List if More Space is Required

A BANK DATA			
Name & Address of Bank	On Deposit	In Whose Name	Owing to Bank

B MARKETABLE STOCK & BONDS					
Name of Security	Name Registered	No. Shares	Market Value	Dividends	If Pledged to Whom & Purpose

C ACCOUNTS RECEIVABLE & PAYABLE					
From Whom Due	Amount	Monthly Repayment	(Charge Accounts) To Whom Due	Amount	Monthly Payment

D REAL ESTATE					
Location & Description	In Whose Name	Market Value	Amount of Mortgage	Monthly Payment	Monthly Rent Receivable

E MORTGAGES OWNED					
Property Covered	Name Registered	Appraised Value	Amount of Mortgage	Monthly Repayment	Prior Mortgage

F EQUIPMENT, CARS, BOATS					
Describe – Year, Make	Cost Price	Market Value	Encumbrance	Monthly Payment	To Whom Due

G OTHER ASSETS & LIABILITIES			
Describe Other Assets	Amount	Describe Other Liabilities	Amount

TRANSFER VALUES FROM SECTIONS “A” THROUGH “G” TO SUMMARY ON REVERSE