

**PERSONAL FINANCIAL STATEMENT (PFS)**



Date of PFS: \_\_\_\_\_ Applicant Name(s): \_\_\_\_\_

Are you a Defendant in any suit or legal action?                      NO                      YES (please explain)

If YES: \_\_\_\_\_

Have you filed for Bankruptcy in last 10 years?                      NO                      YES (please explain)

If YES: \_\_\_\_\_

Residential Status:                      OWN                      RENT                      If RENT, monthly amount: \$ \_\_\_\_\_

**SCHEDULE A:**

Cash on Hand (Banks, Credit Unions, etc)

NAME of BANKING INSTITUTION	NAME(s) on ACCOUNT	BANK BALANCE
<b>TOTAL</b>		

**SCHEDULE B:**

Finance Companies, Credit Cards, Vehicle Loans, Student Loans, etc.

List the names of all the institutions which you have obtained loans.

EXCLUDING Mortgages. For Mortgage see Schedule D

EXCLUDING Agency Loans. For Agency Loans see Schedule E

NAME of INSTITUTION	NAME on ACCOUNT	ORIGINAL BALANCE	AMOUNT OWING	MONTHLY PAYMENT	SECURED by WHAT ASSET
<b>TOTAL</b>					



**SCHEDULE F:**

Life Insurance Carried

COMPANY NAME	FACE AMOUNT	\$ SURRENDER VALUE	LOANS	BENEFICIARY
<b>TOTAL</b>				

**SCHEDULE G:**

Unpaid Taxes

TYPE OF TAXES	BELONGING TO	YEAR	UNDER REPAYMENT		AMOUNT DUE	MONTHLY PAYMENT
			YES	NO		
<b>TOTAL</b>						

**SCHEDULE H:**

Additional Assets

Automobiles, Boats, RVs, Personal Property, etc.

DESCRIPTION OF ITEMS	PRESENT MARKET VALUE
<b>TOTAL</b>	

**SCHEDULE I:**

Additional Liabilities

DESCRIPTION OF LIABILITIES	AMOUNT
<b>TOTAL</b>	

SOURCE of ANNUAL INCOME	IN EVEN DOLLARS
Income (W2, 1099, etc)	
Bonus and Commission Income	
Dividend/Interest Income	
Real Estate Income	
Other Income	
<b>TOTAL</b>	

Please fill in the totals below using the information provided on previous pages.

<b>ASSETS</b>	<b>IN EVEN DOLLARS</b>	<b>LIABILITIES</b>	<b>IN EVEN DOLLARS</b>
Cash on Hand: Total From Schedule A		Credit Card Balances: Total From Schedule B	
Non-Cash Holdings: Total From Schedule C		Automobile Loans: Total From Schedule B	
Real Estate Owned: Total From Schedule D		Student Loans: Total From Schedule B	
Value of the Agency YOU OWN (if applicable) Total From Schedule E		Loan Against Agency YOU OWN (if applicable) Total From Schedule E	
Cash Value Life Insur: Total From Schedule F		Real Estate Payable: Total From Schedule D	
Additional Assets: Total From Schedule H		Life Insur. Loans Total From Schedule F	
		Unpaid Taxes: Total From Schedule G	
<b>TOTAL ASSET</b>		Additional Liabilities: Total From Schedule I	
		<b>TOTAL LIABILITIES</b>	
		<b>NET WORTH</b>	

DATE: \_\_\_\_\_

SIGNATURE OF APPLICANT: \_\_\_\_\_

DATE: \_\_\_\_\_

SIGNATURE OF JOINT APPLICANT: \_\_\_\_\_