

REAL ESTATE								
PARCEL NO.	DETAILED REAL ESTATE	TITLE IN NAME OF	MONTHLY INCOME	MONTHLY EXPENSES	COST	DATE ACQUIRED	IMPROVEMENTS	ESTIMATED VALUE
								\$
TOTAL								\$

ABOVE PARCELS	TO WHOM PAYABLE	HOW PAYABLE	ANNUAL TAXES	ACCT. #	MATURITY DATE	ORIGINAL AMT.	PRESENT BALANCE
		\$ /					\$
		\$ /					
		\$ /					
TOTAL							\$

ANNUAL CASH INCOME		AMOUNT(S) IN WHOLE \$	ANNUAL CASH EXPENDITURES		AMOUNT(S) IN WHOLE \$
CLIENT SALARY BONUSES & COMMISSIONS		\$	INTEREST AND PRINCIPAL PAYMENTS ON REAL ESTATE LOANS		\$
INTEREST INCOME			RESIDENTIAL RENT PAYMENTS		
DIVIDEND INCOME			INTEREST AND PRINCIPAL PAYMENTS LOANS OTHER THAN REAL ESTATE		
ALIMONY/CHILD SUPPORT*			INCOME TAXES		
BUSINESS INCOME			INSURANCE		
CAPITAL GAINS			ALIMONY/CHILD SUPPORT		
NET RENTAL INCOME**			PARTNERSHIP, S CORP, LLC & LLP DISTRIBUTIONS		
PARTNERSHIP, S CORP, LLC & LLP DISTRIBUTIONS			PERSONAL LIVING EXPENSES		
GIFT INCOME			EDUCATIONAL LOANS		
RECEIVABLE INCOME			OTHER EXPENSES (LIST)		
OTHER INCOME (LIST)*					
TOTAL CASH INCOME		\$	TOTAL CASH EXPENDITURES		\$

* ALIMONY, CHILD SUPPORT OR SEPARATE MAINTENANCE INCOME NEED NOT BE REVEALED UNLESS YOU WISH TO HAVE IT CONSIDERED IN DETERMINING YOUR CREDIT WORTHINESS.
 ** NET RENTAL INCOME BEFORE INTEREST AND DEPRECIATION EXPENSES

PLEASE ANSWER THE FOLLOWING QUESTIONS (PLEASE ATTACH DETAILS FOR EACH ITEM MARKED YES):

- | | | |
|---|--------------------------|--------------------------|
| | Yes | No |
| 1. HAVE YOU OR ANY FIRM IN WHICH YOU ARE A MAJOR OWNER OR GUARANTOR EVER DECLARED BANKRUPTCY OR HAD A JUDGMENT AGAINST YOU? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. HAVE YOU EVER VOLUNTARILY SURRENDERED OR HAD A VEHICLE, APPLIANCE OR ANY OTHER ITEM REPOSSESSED? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. ARE ANY OF YOUR TAX RETURNS CURRENTLY BEING AUDITED OR CONTESTED? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. ARE YOU A GUARANTOR, CO-MAKER OR ENDORSER ON DEBT OF ANY PERSON OR ENTITY? | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. ARE ANY ASSETS PLEDGED OR DEBTS SECURED EXCEPT AS INDICATED? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. ARE ANY SIGNIFICANT CHANGES IN INCOME OR EXPENSES EXPECTED IN THE NEXT 12 MONTHS? | <input type="checkbox"/> | <input type="checkbox"/> |

ADDITIONAL INFORMATION

PLEASE PREPARE AND ATTACH COPIES OF THE FOLLOWING:

- WRITTEN STATEMENT OF WORK EXPERIENCE AND EDUCATION
- TAX RETURNS (LAST 2 YEARS – FULL COPIES)
- INTERIM FINANCIAL STATEMENT (NOT OLDER THAN 90 DAYS)

IF THIS IS A PRACTICE ACQUISITION TRANSACTION, PLEASE INCLUDE:

- SCHEDULE "C" OR CORPORATE TAX RETURNS FROM SELLER (LAST 2 YEARS)
- BUY/SELL AGREEMENT (DRAFT OR FINAL)

This signed Personal Financial Statement does not represent in and of itself an application for credit.

I hereby affirm that each of the answers in the foregoing Confidential Personal Financial Statement is true and correct. I authorize you to obtain information from my accountant and any source(s) to which you may apply relative to this Statement, each such source being hereby authorized to provide you with such information. This Statement in any event shall be and remain your property. Should any situation arise which changes any representation made by me in the Statement, I will notify you thereof promptly. I also authorize you to provide to other qualified credit grantors such information as they may request.

X	DATE:	X	DATE:
PRINTED NAME AND TITLE:		PRINTED NAME AND TITLE:	

Spouse must sign only if he or she will be applying for or guaranteeing credit to be considered by Group Financial Services, or is obligated for the existing credit to which this statement relates.