**Personal Financial Statement Form**

#### **Applicant Information**

* **Full Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Date of Birth: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Social Security Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Home Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **City, State, Zip: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

#### **Financial Summary Table**

| **Category** | **Description** | **Amount ($)** | **Remarks** |
| --- | --- | --- | --- |
| **Assets** | **Cash & Bank Accounts** |  |  |
|  | **Investments & Real Estate** |  |  |
| **Liabilities** | **Mortgage & Loans** |  |  |
|  | **Credit Card Debt** |  |  |
| **Net Worth** | **(Total Assets - Liabilities)** | **$\_\_\_\_\_\_\_\_\_\_** | **\_\_\_\_\_\_\_\_\_\_** |

#### **Income Details**

* **Primary Income Source: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Annual Salary: $\_\_\_\_\_\_\_\_\_\_**
* **Additional Income: $\_\_\_\_\_\_\_\_\_\_**
* **Sources of Other Income: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

#### **Asset Information**

* **Cash on Hand: $\_\_\_\_\_\_\_\_\_\_**
* **Savings Account Balance: $\_\_\_\_\_\_\_\_\_\_**
* **Checking Account Balance: $\_\_\_\_\_\_\_\_\_\_**
* **Investments (Stocks, Bonds, etc.): $\_\_\_\_\_\_\_\_\_\_**
* **Real Estate Holdings: $\_\_\_\_\_\_\_\_\_\_**
* **Retirement Accounts (401k, IRA, etc.): $\_\_\_\_\_\_\_\_\_\_**

#### **Liabilities and Expenses**

* **Mortgage Balance: $\_\_\_\_\_\_\_\_\_\_**
* **Car Loans: $\_\_\_\_\_\_\_\_\_\_**
* **Credit Card Debt: $\_\_\_\_\_\_\_\_\_\_**
* **Student Loans: $\_\_\_\_\_\_\_\_\_\_**
* **Personal Loans: $\_\_\_\_\_\_\_\_\_\_**
* **Other Outstanding Debt: $\_\_\_\_\_\_\_\_\_\_**

#### **Declaration & Signature**

**I hereby certify that the information provided in this Personal Financial Statement Form is true and accurate to the best of my knowledge.**

**Applicant’s Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
 Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**