

# 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: \_\_\_\_\_