

PERSONAL FINANCIAL STATEMENT

As of (date) _____

Important! If married, Federal Statute REQUIRES that this form MUST be completed and signed jointly.
 Complete this form for: (1) each proprietor, or (2) each limited partner who owns 20% or more interest and each general partner, or (3) each member of a Limited Liability Partnership, or (4) each stockholder owning 20% or more of voting stock and each corporate officer and director, or (5) each member of a Limited Liability Company owning 20% or more interest, or (6) any other person or entity providing a guaranty on the loan.

Your Name & Spouse's Name _____					
Residence Phone _____			Business Phone _____		
Residence Address _____					
City _____		State _____		Zip _____	
Business Name of Applicant/Borrower _____					
ASSETS			LIABILITIES		
Cash on hand & in banks	\$ _____		Accounts Payable	\$ _____	
Savings Accounts	\$ _____		Notes Payable to Banks & Others	\$ _____	
IRA or other retirement accounts	\$ _____		<i>(describe in Section 2)</i>		
Accounts & Notes Receivable	\$ _____		Installment Account (Auto)	Monthly Payment _____	\$ _____
Life Insurance-Cash Surrender Value Only	\$ _____		Installment Account (Other)	Monthly Payment _____	\$ _____
<i>(complete Section 8)</i>					
Stocks and Bonds	\$ _____		Loan on Life Insurance	\$ _____	
<i>(describe in Section 3)</i>			Mortgages on Real Estate	\$ _____	
Real Estate	\$ _____		<i>(describe in Section 4)</i>		
<i>(describe in Section 4)</i>			Unpaid Taxes	\$ _____	
Automobile: Present Value	\$ _____		<i>(describe in Section 6)</i>		
Other Personal Property	\$ _____		Other Liabilities	\$ _____	
<i>(describe in Section 5)</i>			<i>(describe in Section 7)</i>		
Other Assets	\$ _____		TOTAL LIABILITIES	\$ _____	
<i>(describe in Section 5)</i>					
TOTAL ASSETS	\$ _____		NET WORTH	\$ _____	
SECTION 1: SOURCE OF INCOME			CONTINGENT LIABILITIES		
Salary	\$ _____		As Endorser or Co-Maker	\$ _____	
Net Investment Income	\$ _____		Legal Claims & Judgments	\$ _____	
Real Estate Income	\$ _____		Provision for Federal Income Tax	\$ _____	
Other Income	\$ _____		Other Special Debt	\$ _____	
<i>(describe below)</i>					
Description of Other Income in Section 1					
*Alimony or child support payments need not be disclosed in 'other income' unless it is desired to have such payments counted toward total income.					
SECTION 2: NOTES PAYABLE TO BANK & OTHERS					
Name & Address of Note Holder (s)	Original Balance	Current Balance	Payment Amount	Frequency (monthly, etc.)	Type of Collateral
SECTION 3: STOCKS AND BONDS					
# Of shares	Name of Securities	Cost	Market Value Quotation/Exchange	Date of Quotation/Exchange	Total Value

SECTION 4: REAL ESTATE OWNED – list each parcel separately, use attachments if necessary.

	Property A	Property B	Property C
Type of Property			
Address of Property			
Name of Property Owner			
Date Purchased			
Original Cost			
Present Market Value			
Name of Lender			
Loan Number			
Loan Balance			
Monthly Payment			
Status of Loan			
Rental Income Per Month			

SECTION 5: OTHER PERSONAL PROPERTY AND OTHER ASSETS

SECTION 6: UNPAID TAXES – describe in detail, as to type, to whom payable, when due, amount & to what property, if any, a tax lien attaches

SECTION 7: OTHER LIABILITIES – describe in detail

SECTION 8: INSURANCE HELD – give face amount & cash surrender value of policies, name of insurance & beneficiaries

I authorize SBA/Business Finance Group, Inc. to make inquiries as necessary to verify the accuracy of the statements made & determine my creditworthiness. I certify the above & the statements contained in the attachments are true & accurate as of the dated dates(s). These statements are made for the purpose of either obtaining a loan or guaranteeing a loan. I understand FALSE statements may result in forfeiture of benefits and possible prosecution by the U.S. Attorney General (Reference 18 U.S.C. 1001.)

Signature	Date	SS#
Signature	Date	SS#