

Personal Financial Statement

Name Joe Smith		Birthdate 5/18/1980		Social Insurance No.	
Street 556 First Street Address		City Smithville		State MN	Zip 65984 Code
Home Phone No.		Residence Own <input type="checkbox"/> Rent <input type="checkbox"/> Other <input type="checkbox"/>		How Long At Present Address? ____ Years ____ Months	
Occupation		Currently Employed By (Include Address)		How Long With Employer ? ____ Years ____ Months	
Employer's Phone No.		Married <input type="checkbox"/> Single <input type="checkbox"/> Separated <input type="checkbox"/> Note: Single Includes Divorced And Widowed			Number Of Dependents _____
Your Principal Financial Institution And Address					

Personal Data On Your Spouse		<u>Note:</u> Under the laws of Canada or the provinces, your spouse may have a legal interest or obligation arising from your business dealings and may also have an interest in your personal assets	
Spouse's Name		Birthdate	
		Social Insurance No.	
Occupation		Currently Employed By (Include Address)	
		How Long With Employer? ____ Years ____ Months	

Financial Information					
Assets		List And Describe All Assets		Liabilities	
				List Credit Cards, Open Lines Of Credit And Other Liabilities (Including Alimony And Child Support)	
	Value			Balance Owning	Monthly Pmt
Total Checking Balances	\$ 36000	Bank Loans		\$ 20000	\$ 350
Total Savings Balances	\$ 51000	Real Estate Mortgages (See Schedule B, Page 2)		\$ 180000	\$ 1200
Life Insurance Cash Value (See Schedule C, Page 2)	\$	Personal Lines of Credit		\$ 15000	\$ 275
Automobile Make Model Year	\$ 51000	Car Loans		\$ 30000	\$ 900
Stocks & Bonds (See Schedule A, Page 2)	\$	Monthly Rent Payment			\$ n/a
Accounts/Notes Receivables (Please Itemize)		Credit Cards (Itemize)	Limit		
	\$		\$	\$	\$
	\$		\$	\$	\$
Real Estate Owned(See Sched B, Page 2)	\$ 200000		\$	\$	\$
Retirement Accounts	\$ 65000	Other Obligations (Please Describe)			
Other Assets (Household Goods, Etc.)	\$			\$	\$
Other (Describe)	\$			\$	\$
Other (Describe)	\$	Total Monthly Payments (Far Right Column)			\$ 2,725
Total Assets (I)	\$ 403,000	Total Liabilities (II)		\$ 245000	
		Net Worth (I – II)		\$ 158000	