

PERSONAL FINANCIAL STATEMENT

★★★★★ - Rated Five Stars in Customer Service"

Complete this form for: (1) each proprietor, or (2) each limited partner who owns 10% or more interest and each general partner, or (3) each stockholder owning 10% or more of voting stock, or (4) any person or entity providing a guaranty on the loan.

Name: _____ Birth Date: _____ Soc. Sec. #: _____

Spouse: _____ Birth Date: _____ Soc. Sec. #: _____

Residence Address: _____

City, State, & Zip Code: _____ Residence Phone: _____

Business Name of Applicant/Borrower: _____

ASSETS

Cash on hand and in Banks \$ _____
Savings Accounts \$ _____
IRA or Other Retirement Account \$ _____
Accounts & Notes Receivable \$ _____
Life Insurance-Cash Surrender Value Only \$ _____
(Complete Section 8)
Stocks and Bonds \$ _____
(Describe in Section 3)
Real Estate \$ _____
(Describe in Section 4)
Other Personal Property \$ _____
(Describe in Section 5)
Other Assets \$ _____
(Describe in Section 5)

Total Assets: \$ _____

LIABILITIES

Accounts Payable \$ _____
Notes Payable to Banks and Others \$ _____
(Describe in Section 2)
Installment Account (Auto) \$ _____
Mo. Payments \$ _____
Installment Account (Other) \$ _____
Mo. Payments \$ _____
Loan on Life Insurance \$ _____
Mortgages on Real Estate \$ _____
(Describe in Section 4)
Unpaid Taxes \$ _____
(Describe in Section 6)
Other Liabilities \$ _____
(Describe in Section 7)

Total Liabilities: \$ _____

Net Worth \$ _____
(Total Assets less Total Liabilities):

Section 1. Source of Income

Salary \$ _____
Net Investment Income \$ _____
Real Estate Income \$ _____
Other Income (Describe below)* \$ _____

Contingent Liabilities

As Endorser or Co-Maker \$ _____
Legal Claims & Judgments \$ _____
Provision for Federal Income Tax \$ _____
Other Special Debt \$ _____

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.*

SURETY BONDS

Performance Bonds | Contract Bonds | License Bonds | Court Bonds

Section 2.

Notes Payable to Bank and Others.

(Use attachments if necessary. Each attachment must be identified as a part of this statement and signed.)

Name and Address of Noteholder(s)	Original Balance	Current Balance	Payment Amount	Frequency (monthly, etc.)	How Secured or Endorsed Type of Collateral
	\$	\$	\$		
	\$	\$	\$		
	\$	\$	\$		

Section 3.

Stocks and Bonds.

(Use attachments if necessary. Each attachment must be identified as a part of this statement and signed.)

Number 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. Each attachment must be identified as a part of this statement and signed.)

Real Estate Owned	PROPERTY A	PROPERTY B	PROPERTY C
Type of Property			
Address			
Date Purchased			
Original Cost	\$	\$	\$
Present Market Value	\$	\$	\$
Mortgage Holder			
Mortgage Balance	\$	\$	\$
Monthly Payment	\$	\$	\$

Section 5.

Other Personal Property and Other Assets.

(Describe, and if any is pledged as security, state name and address of lien holder, amount of lien, terms of payment, and if delinquent, describe delinquency).

Section 6.

Unpaid Taxes.

(Describe in detail, as to type, to whom payable, when due, amount, and to what property, if any, a tax lien attaches.)

Section 7.

Other Liabilities.

(Describe in detail).

Section 8.

Life Insurance Held.

(Give face amount and cash surrender value of policies - name of insurance company and beneficiaries).



SIGNATURE PAGE OF BOND APPLICATION

THE SIGNING OF THIS APPLICATION DOES NOT BIND THE COMPANY TO OFFER NOR THE APPLICANT TO PURCHASE, THE BOND/INSURANCE. IT IS AGREED THAT THIS APPLICATION, INCLUDING ANY MATERIAL SUBMITTED THEREWITH, SHALL BE THE BASIS OF THE BOND/INSURANCE THE COMPANY WILL HAVE RELIED UPON THIS APPLICATION, INCLUDING ANY MATERIAL SUBMITTED IN CONNECTION WITH THE APPLICATION PROCESS, IN ISSUING THE POLICY.

ELECTRONICALLY REPRODUCED SIGNATURES WILL BE TREATED AS ORIGINAL.

AUTHORIZATION/RELEASE FOR BUSINESSES AND PROFESSIONALS

_____ (the "Applicant") acknowledges that it is in the best interest of both Applicant and ("Surety Broker / Agent") for Surety Broker / Agent to perform due diligence concerning Applicant's background and experience. Applicant further acknowledges that Applicant benefits from the efficiencies in the due diligence process that are possible when Surety Broker / Agent and other similarly-situated entities in the Surety Broker / Agent industry exchange information about their experiences in doing business with professionals/entities such as Applicant. Therefore, Applicant hereby consents and gives Surety Broker / Agent and CoreLogic Credco, LLC ("CREDCO"), permission to obtain information about Applicant, Applicant's company and any and all employees/contractors of that company including, but not limited to, professional malpractice insurance coverage, professional history information and other public record information. Applicant hereby releases and agrees to hold harmless Surety Broker / Agent and/or CREDCO, from any and all liability for damages, losses, costs, and expenses that may arise from the use of any information recorded and/or provided by CREDCO for Surety Broker / Agent.

ACCURACY OF INFORMATION ON APPLICATION

I certify the above and the statements contained in the attachments are true and accurate as of the stated date(s) These statements are made for the purpose of obtaining a bond or insurance. I understand FALSE statements may result in forfeiture of benefits and possible criminal and/or civil prosecution. Any person who knowingly and with intent to injure, defraud, or deceive any insurer files a statement of claim or an application containing false, or misleading information is guilty of a felony of the third degree.

(Name of Individual or Entity)

(Signature of Individual or Authorized Officer of Entity)

(Printed Name of Individual or Authorized Officer of Entity)

(Date)

SURETY BONDS

Performance Bonds | Contract Bonds | License Bonds | Court Bonds

