

PERSONAL FINANCIAL STATEMENT

Name _____ Birthdate _____
 Address _____ City, State, Zip Code _____
 Home Phone # _____ Social Security Number _____
 Driver's License # _____ State Issued In _____ Expiration Date _____
PLEASE ATTACH A LEGIBLE COPY OF YOUR DRIVER'S LICENSE Email address _____

BUSINESS NAME _____ **DATE BUSINESS STARTED** _____

I hereby make the following statement of all my assets and liabilities as of the _____ day of _____, 20____, and give other material information for the purpose of entering into a Lease with you bearing my signature or guarantee, and agree to notify you promptly of any change affecting my ability to pay.

ASSETS SOLELY OWNED <small>(List here only those assets not jointly owned)</small>		ALL LIABILITIES AND NET WORTH <small>(List here all liabilities, joint or otherwise)</small>	
Cash (Total from Schedule 1)	\$	Loans Payable (Car, Education, etc.) (Total Schedule 6)	\$
Stocks and Bonds (Total from Schedule 2)		Credit Cards Payable (Total Schedule 7)	
Accounts/Loans Receivable (Schedule 3)		Other Loans Payable	
Whole Life Insurance - Cash Value (Schedule 4)		Mortgages on Real Estate (Schedule 5)	
Real Estate (Total from Schedule 5)		Accounts Payable	
Automobiles		Other Liabilities	
Other Assets (Itemize)		TOTAL LIABILITIES	\$
TOTAL ASSETS SOLELY OWNED	\$	NET WORTH (Total All Assets minus Total Liabilities)	\$
JOINTLY OWNED ASSETS		SOURCE OF INCOME <small>You need not disclose income from alimony, child support or maintenance payments, unless you wish it to be considered as</small>	
Cash (Total from Schedule 1)	\$	Salary (annual)	\$
Stocks and Bonds (Total from Schedule 2)		Bonus and Commissions (annual)	
Accounts/Loans Receivable (Schedule 3)		Dividends	
Whole Life Insurance - Cash Value (Schedule 4)		Real Estate Income (annual)	
Real Estate (Total from Schedule 5)		Other Income (Itemize):	
Automobiles			
Other Assets (Itemize)		TOTAL INCOME	\$
<u>PERSONAL INFORMATION</u>			
Business or Occupation			
TOTAL JOINTLY OWNED ASSETS	\$	Partner or Officer in any other venture? If YES, name of venture:	
TOTAL OF ALL ASSETS	\$	Dependents: _____ Other Dependents: _____	
Have you ever taken bankruptcy, made a composition settlement, or are you a defendant in any legal action? Explain.			
Are there any tax liens or judgments against you? Explain			
Do you have a will? Yes _____ No _____ Who is named as your executor?			

SCHEDULE I List of all bank accounts including savings and indicate if it is a joint account		Cash Balance
Name and Address of Bank		\$
		\$
		\$
TOTAL (Insert on page 1)		\$

SCHEDULE 2 - Stocks and Bonds (Insert Total Present Market Value on Page 1)					
NUMBER OF SHARES	DESCRIPTION OF SECURITY INCLUDING COMPANY NAME	REGISTERED IN NAME OF	ORIGINAL COST	PRESENT MARKET VALUE	IS IT PLEDGED? IF SO, TO WHOM?

Schedule 3 Accounts and Loans Receivable (Insert total amount owed on Page 1)						
NAME AND ADDRESS OF DEBTOR	AMOUNT OWED	AGE OF DEBT	DESCRIPTION OF NATURE OWED	DESCRIPTION OF SECURITY HELD	DATE PYMT EXPECTED	

SCHEDULE 4 Life Insurance - Whole Life Policies only (Insert total Cash Surrender Value on page 1)						
OWNER OF POLICY	NAME OF BENEFICIARY	NAME OF INSURANCE CO	FACE VALUE OF POLICY	TOTAL CASH SURRENDER VALUE	TOTAL LOANS ON POLICY	POLICY ASSIGNED?

SCHEDULE 5 - Real Estate Owned (Insert Total Present Market Value on Page 1)							
ADDRESS	TITLE IN NAME OF	MORTGAGES OR LIENS	AMOUNT PAYMENTS	ORIGINAL COST	ASSESSED VALUE	PRESENT MKT VALU	ARE TAXES CURRENT?

SCHEDULE 6 Loans Payable (Insert Total Amount Owed on Page 1)				
NAME AND ADDRESS PAYABLE TO	CURRENT AMOUNT OWED	AGE OF DEBT	DESCRIPTION OF DEBT (STUDENT LOAN, CAR, ETC.)	DATE PMNT IS DUE

SCHEDULE 7 CREDIT CARDS PAYABLE (Insert Total Amount Owed on Page 1)			
CREDIT CARD ISSUER NAME AND ADDRESS	CURRENT AMOUNT OWED	AGE OF DEBT	
	\$		
	\$		
	\$		
	\$		

These statements are delivered to Landlord to induce it to enter into a Lease, at Landlord's discretion, to the undersigned. The undersigned hereby certifies that these statements are correct and complete, and accurately reflect the condition and affairs of the undersigned at the date and for the period(s) stated and that said statements reflect all known liabilities, direct or contingent, as of the date thereof. The undersigned also represents and warrants that to his knowledge there has to date been no material adverse change in the conditions or affairs of undersigned from the date of said statements.

The undersigned hereby warrants that legal title to all property herein described or referred to, excepting only jointly owned property as separately scheduled herein as such, is in the sole name of the undersigned. Every person who is a party to this statement agrees that his/her separate property listed or referred to herein and property or interests listed herein as joint ownership by entirety or in common with another party to this statement, shall be available to the Landlord for payment of all indebtedness or other obligations of the party making this statement, either voluntarily or involuntarily, by levy of execution or otherwise.

Landlord is authorized to make all inquiries deemed necessary to verify the accuracy of the information contained herein, and to determine the credit worthiness of the undersigned. The undersigned authorizes Landlord to answer questions from outside parties about its credit experience with the undersigned.

The undersigned certifies to Landlord/Landlord's agent ED MCAFEE, LREA, INC that the undersigned is not a terrorist or working on behalf of a terrorist, terrorist entity, or anyone else on the U.S. Treasury Department's Office of Foreign Assets Control (OFAC) list of "Specially Designated Nationals and Blocked Persons".

Signature _____ Date _____