

PERSONAL FINANCIAL STATEMENT

As of _____

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 stockholder owing 20% or more of voting stock, or (4) any other person or entity providing a guaranty of the loan.

Name _____ Business Phone _____

Residence Address _____ Residence Phone: _____

City _____ State _____ Zip Code _____

Email address: _____

Business Name of Applicant/Borrower: _____

ASSETS		(Omit Cents)	LIABILITIES		(Omit Cents)
Cash on hand & in Banks	\$		Accounts Payable	\$	
Savings Accounts	\$		Notes Payable to Bank & Others	\$	
IRA or Other Retirement Account	\$		(Describe in Section 2)		
Accounts & Notes Receivable	\$		Installment Account (Auto)	\$	
Life Insurance			Mo. Payments \$		
(Cash Surrender Value Only)	\$		Installment Account (Other)	\$	
(Complete Section 8)			Mo. Payments \$		
Stocks and Bonds	\$		Loan on Life Insurance	\$	
(Describe in Section 3)			Mortgages on Real Estate	\$	
Real Estate	\$		(Describe in Section 4)		
(Describe in Section 4)			Unpaid Taxes	\$	
Automobile - Present Value	\$		(Described in Section 6)		
Other Personal Property	\$		Other Liabilities	\$	
(Describe in Section 5)			(Describe in Section 7)		
Other Assets	\$		Total Liabilities	\$	
(Describe in Section 5)			Total Net Worth	\$	
Total	\$				
Section 1. Source of Income			Contingent Liabilities		
Salary	\$		As Endorser or Co-Maker	\$	
Net Investment Income	\$		Legal Claims & Judgments	\$	
Real Estate Income	\$		Provision for Fed Income Tax	\$	
Other Income (Describe below)*	\$		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.					
Section 2. Notes Payable to Banks and Others (Use attachments if necessary. Each attachment must be identified as a part of this statement and signed.)					
Name & 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.)

	Property A	Property B	Property C	Property D
Type of Property				
Address				
Date Purchased				
Original Cost				
Present Market Value				
Name and Address of Mortgage Holder				
Mortgage Account Number				
Mortgage Balance				
Amount of Payment per Month/Year				
Status of Mortgage				

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.)

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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.)

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Section 7. Other Liabilities. (Describe in detail.)

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Section 8. Life Insurance Held. (Give face amount and cash surrender value of policies – name of insurance company and beneficiaries.)

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I authorize the City of Norfolk to make inquiries as necessary to verify the accuracy of the statements made and to determine my creditworthiness. 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 either obtaining a loan or guaranteeing a loan. I understand FALSE statements may result in forfeiture of benefits and possible prosecution.

Signature:	Date:	Social Security Number:
Signature:	Date:	Social Security Number:

Additional Real Estate Owned.				
	Property E	Property F	Property G	Property H
Type of Property				
Address				
Date Purchased				
Original Cost				
Present Market Value				
Name and Address of Mortgage Holder				
Mortgage Account Number				
Mortgage Balance				
Amount of Payment per Month/Year				
Status of Mortgage				

Additional Real Estate Owned.				
	Property I	Property J	Property K	Property L
Type of Property				
Address				
Date Purchased				
Original Cost				
Present Market Value				
Name and Address of Mortgage Holder				
Mortgage Account Number				
Mortgage Balance				
Amount of Payment per Month/Year				
Status of Mortgage				

Additional Real Estate Owned.				
	Property M	Property N	Property O	Property P
Type of Property				
Address				
Date Purchased				
Original Cost				
Present Market Value				
Name and Address of Mortgage Holder				
Mortgage Account Number				
Mortgage Balance				
Amount of Payment per Month/Year				
Status of Mortgage				