

**THE
BOND EXCHANGE**
AND INSURANCE AGENCY

PERSONAL FINANCIAL STATEMENT

Name in Full	Social Security Number
Spouse's Name in Full	Spouse's Social Security Number
Home Phone Number	Business Phone Number
Resident Address	

CURRENT ASSETS	CURRENT LIABILITIES
CASH	
Total Cash in Checking Account(s)	Credit Card Debt (<i>Total of All Revolving Credit Lines</i>)
Total Cash in Saving Account(s)	
Other	
STOCKS & BONDS	
Current Value of Stocks & Bonds	
Current Value of Retirement Account(s)	
REAL ESTATE	REAL ESTATE
Primary Residence (<i>Current Market Value</i>)	Primary Loan Balance on Personal Residence
Investment Property(s) (<i>Current Market Value</i>)	Loan Balance(s) on Investment Property(s)
Other	2 nd Mortgage or Home Equity Line Balance
LIFE INSURANCE	LIFE INSURANCE
Cash Surrender Value	Loans against Life Insurance Policies
VEHICLES	VEHICLES
Present Value (<i>Total of all Vehicles</i>)	Current Loan Balances/Payoff (all Vehicles)
OTHER ASSETS (PLEASE DESCRIBE)	OTHER LIABILITIES (PLEASE DESCRIBE)
TOTAL ASSETS	TOTAL LIABILITIES

STOCKS & BONDS		
Name/Description of Security	No. of Shares/Par Value	Current Market Value

REAL ESTATE						
Property Address	Date Purchased	Purchase Price	Market Value	Monthly Payment	Mortgage Balance	Rental Income

Do you have a personal trust? Yes No Do you have a prenuptial agreement? Yes No
 Have you ever declared bankruptcy? Yes No Do you have any State or Federal tax liens? Yes No
 Do you have a home equity line of credit? Yes No If so, what is the amount of the line? \$ _____

The information contained in this statement is provided for the purpose of securing surety bonding and I affirm that it is true and complete to the best of my knowledge. I hereby authorize the Surety to obtain my personal credit report, should it be warranted during the underwriting process.

Primary Signature _____ Spouse's Signature _____

Printed Name _____ Date _____ Printed Name _____ Date _____