

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

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

REAL ESTATE - Real Estate Schedule Attachment Available If Needed						
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 \_\_\_\_\_