



# EQUIPMENT FINANCE SOLUTIONS

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 www.EquipmentFinanceSolutions.com

## PERSONAL FINANCIAL STATEMENT

Applicant Name: \_\_\_\_\_ SSN: \_\_\_\_\_ Birth date: \_\_\_\_\_  
 Spouse's Name: \_\_\_\_\_ SSN: \_\_\_\_\_ Birth date: \_\_\_\_\_  
 Physical Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Years: \_\_\_\_\_  
 Mailing Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Previous Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Years: \_\_\_\_\_  
 Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_  
 Bank of Personal Account: \_\_\_\_\_ Branch: \_\_\_\_\_ Phone \_\_\_\_\_ Account #: \_\_\_\_\_  
 Nearest Living Relative: \_\_\_\_\_ Relationship: \_\_\_\_\_  
 Relative's Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

### ASSETS

### LIABILITIES

Cash in Bank		Notes Payable to Bank	
Cash on Hand		Notes Payable to Others	
U.S. Government Securities – Schedule 1		Notes Payable to Relatives	
Stocks & Bonds – Schedule 1		Accounts & Bills Payable – Schedule VI	
Accounts & Notes Receivable from Relatives & Friends – Schedule II		Accrued Taxes, etc.	
Accounts & Notes Receivable from Others – Schedule II		Chattel Mortgages or Liens Payable – Schedule IV	
Real Estate Mortgages & Contracts Owned – Schedule III		Mortgages or Liens on Real Estate – Schedule IV	
Real Estate Owned – Schedule IV		Loans on Life Insurance Policies – Schedule V	
Auto(s) Year: _____ Make: _____ Year: _____ Make: _____		Other Debts – Itemize – Schedule VI	
Personal Property		Income Tax Payable	
Cash Value Insurance – Schedule V			
Other Assets – Itemize		Total Liabilities	\$
		Net Worth (Assets minus Liabilities)	\$
<b>TOTAL ASSETS</b>	<b>\$</b>	<b>TOTAL LIABILITIES &amp; NET WORTH</b>	<b>\$</b>

### SOURCE OF INCOME

### CONTINGENT LIABILITIES

Salary <input type="checkbox"/> Monthly <input type="checkbox"/> Annual		As Endorser or Co-Maker	\$
Bonus & Commissions <input type="checkbox"/> Monthly <input type="checkbox"/> Annual		On Leases or Contract	\$
Dividends		Provision for Federal Income Taxes	\$
Real Estate Income		Other Special Debt	\$
Other Income – Itemize			
<b>TOTAL</b>	<b>\$</b>		

Have you ever taken Bankruptcy?  No  Yes, please attach explanation Are you a defendant in any suites or legal actions?  No  Yes, please attach explanation

For the purpose of procuring and establishing credit from time to time with you for claims and demands against me, I furnish you the foregoing and following statement and information contained on both sides of this sheet as being a true and correct statement of my financial condition on the date stated, and agree that in case any change occurs which materially reduces my ability to pay all claims and demands against me or materially increases my liabilities or decreases my assets, I will notify you without delay. In consideration of the Bank granting me any credit, I agree that in case of the commission by me of any of the acts defined in the National Bankruptcy Act as acts of bankruptcy by a person, or in the event of it appearing at any time that any of the following representatives are untrue, or in the case of the occurrence of such change, as aforesaid, or my failure to notify you of such change as above agreed, all and any of my promissory notes or other claims or demands held by you against me and which may not be due at said time shall, at your option, become immediately due and payable. I further agree that the exercise of, or omission to exercise such option in any instance shall not waive or affect any other or subsequent right to exercise the same.

Applicant Signature: X \_\_\_\_\_

Date: \_\_\_\_\_

**SCHEDULE I:**

**STOCKS AND BONDS**

NO. SHARES OR PAR VALUE	DESCRIPTION	VALUE PER SHARE	TOTAL MARKET VALUE	NO. SHARES OR PAR VALUE	DESCRIPTION	VALUE PER SHARE	TOTAL MARKET VALUE

**SCHEDULE II:**

**ACCOUNTS AND NOTES RECEIVABLE**

DUE FROM	MONTHLY INCOME	ORIGINAL BALANCE	PRESENT BALANCE	COLLATERAL	COMMENTS

**SCHEDULE III:**

**CONTRACTS OR MORTGAGES OWNED**

LOCATION (TYPE OF PROPERTY)	MONTHLY INCOME	ORIGINAL BALANCE	PRESENT BALANCE	AMOUNT OWED	MONTHLY PAYMENT	OWED TO

**SCHEDULE IV:**

**REAL ESTATE OWNED**

LEGAL DESCRIPTION OR ADDRESS	COST	MARKET VALUE	MORTGAGE OR LIEN	MONTHLY PAYMENT	MORTGAGE HOLDER	MONTHLY INCOME

**SCHEDULE V:**

**CONTRACTS OR MORTGAGES OWNED**

NAME OF INSURED	LIFE INSURANCE COMPANY	AMOUNT OF POLICY	CASH VALUE	LOANS AGAINST POLICY	BENEFICIARY

**SCHEDULE VI:**

**ACCOUNTS, BILLS & OTHER DEBTS PAYABLE**

PAYABLE TO	COLLATERAL	PAYMENTS	BALANCE	PAYABLE TO	COLLATERAL	PAYMENT	BALANCE

Have you established a Trust Account?  No  Yes. If yes, who is the Trustee? \_\_\_\_\_

Have you made a will?  No  Yes. If yes, who is the Executor? \_\_\_\_\_

LIST ALL CONTINGENT LIABILITIES, INCLUDING GUARANTIES, ENDORSEMENTS, CLAIMS, AND SUITES

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IMPORTANT: Submit on an attached sheet any explanation necessary for a clear understanding of the foregoing statement, particularly if you are contingently liable as an endorser, guarantor or co-maker; or if there are unsatisfied legal claims against you; or if you are a partner or officer in any other venture; and if any assets listed on this statement are not community property or held in joint tenancy.