

PERSONAL FINANCIAL STATEMENT

Name _____

Address _____

Telephone _____

Business or Occupation: _____

Partner or Officer in any other venture? _____ If Yes, Explain: _____

Are any assets pledged? _____ If Yes, Explain: _____

Have you ever made a composition settlement or taken bankruptcy? _____ If Yes, Explain: _____

For the purpose of procuring and maintaining credit from time to time in any form whatsoever, for claims and demands against the undersigned, the undersigned submits the following as being a true and accurate statement of its financial condition on the following date, and agree that if any change occurs that materially reduces the means or ability of the undersigned to pay all claims or demands against it, the undersigned will immediately and without delay notify Rust - Ewing Insurance, and unless Rust - Ewing Insurance is so notified it may continue to rely upon the statement herein given as a true and accurate statement of the financial condition of the undersigned as of _____, 20____.

ASSETS

LIABILITIES AND NET WORTH

Cash on Hand and in Banks (Schedule 1)	\$	Notes to Banks - Secured/Unsecured (Schedule 1)	\$
Non-Retirement Marketable Securities (Schedule 4)	\$	Consumer Debt & Credit Card (1) -	\$
Retirement Marketable Securities (Schedule 4)	\$	Consumer Debt & Credit Card (2) -	\$
Accounts and Notes Receivable (Schedule 2)	\$	Consumer Debt & Credit Card (3) -	\$
Cash Surrender Value Life Insurance (Schedule 3)	\$	Notes Payable to Relatives	\$
Closely Held Securities (Schedule 4)	\$	Accounts and Notes Payable to Others	\$
Residence (Schedule 5)	\$	Rents and Interest Due	\$
Other Real Estate (Schedule 5)	\$	Taxes Due (Schedule 5)	\$
Automobiles - Number ()	\$	Liens on Real Estate (Schedule 5)	\$
Other Assets (Itemize)		Mortgage on Home (Schedule 5)	\$
	\$	Other Liabilities (Itemize)	
	\$		\$
	\$		\$
	\$		\$
	\$	TOTAL LIABILITIES	\$
		NET WORTH	\$
TOTAL ASSETS	\$	TOTAL LIABILITIES AND NET WORTH	\$

COMMENTS:

SCHEDULES

No. 1 Banking Information. (A list of my banking relationships.)

Name and Location	Cash Balance	Amount of Loan	Maturity of Loan	How Endorsed, Guaranteed or Secured
	\$	\$		
	\$	\$		
	\$	\$		
	\$	\$		
	\$	\$		

No. 2 Accounts, Loans and Notes Receivable. (A list of the largest amounts owed to me.)

Name and Address of Debtor	Amount Owing	Age of Debt	Description or Nature of Debt	Description of Security Held	Date Payment Expected
	\$				
	\$				
	\$				
	\$				
	\$				
	\$				

No. 3 Life Insurance.

Name of Person Insured	Name of Beneficiary	Name of Insurance Co.	Type of Policy	Face Amount of Policy	Total Cash Surrender Value	Total Loan Yearly Policy	Amount of Yearly Premium	Is Policy Assigned?
				\$	\$		\$	
				\$	\$		\$	
				\$	\$		\$	
				\$	\$		\$	

No. 4 Stocks and Bonds. (Marketable & Closely Held/Private.)

Face Value Bonds No. Stock Shares	Description of Security	Registered in Name of	Cost	Present Market Value	Income Received Last Year	If Pledged State to Whom
			\$	\$	\$	
			\$	\$	\$	
			\$	\$	\$	
			\$	\$	\$	
			\$	\$	\$	
			\$	\$	\$	

No. 5 Real Estate. The legal and equitable title to all the real estate listed in this statement is solely in the name of the undersigned, except as follows: _____

Description or Street No.	Dimensions or Acres	Improvements Consist of	Mortgages or Liens	Due Dates & Amounts of Payments	Assessed Value	Present Market Value	Unpaid Taxes	
							Year	Amt.
					\$	\$		\$
					\$	\$		\$
					\$	\$		\$
					\$	\$		\$
					\$	\$		\$

The undersigned certifies that the information inserted on both pages hereof has been carefully read and is true and correct.

Date: _____

Signed: _____