

# Personal Financial Statement

**Commercial Funding Professionals, LLC**  
**(304) 258-7672 Phone**  
**Attn: Janie Young**  
**Fax completed form to 206-202-2974**

SECTION 1-INDIVIDUAL INFORMATION (Type or Print)	SECTION 2-OTHER PARTY INFORMATION (Type or Print)
Name	Name
Residence Address	Residence Address
City, State & Zip	City, State & Zip
Position or Occupation	Position or Occupation
Business Name	Business Name
Business Address	Business Address
City, State & Zip	City, State & Zip
Res. Phone	Res. Phone
Bus. Phone                      Bus. Fax No.	Bus. Phone                      Bus. Fax No.

**SECTION 3-STATEMENT OF FINANCIAL CONDITION AS OF \_\_\_\_\_ 20\_\_\_\_**

<b>ASSETS</b> (Do not include Assets of doubtful value)	<b>In Dollars</b> (Omit cents)	<b>LIABILITIES</b>	<b>In Dollars</b> (Omit cents)
Cash on hand and in banks - personal accts.		Notes payable to banks	
Cash in bank - business accounts		Credit Card Balances (non business accounts)	
Stocks and Bonds -see Schedule A		Life Insurance Loan	
Retirement Accounts		Loans Payable - other	
Interest in Private Business - see schedule B		Unpaid tax	
Real Estate Owned - see Schedule D personal, rental, and investment		Real Estate Mortgage	
Automobiles		Home Equity Line of Credit	
Other Personal Property		Automobile Loan	
Cash value-life insurance-see Schedule E		Other liabilities - itemize	
Loan Receivable - other			
Other assets-itemize			
		<b>TOTAL LIABILITIES</b>	
		<b>NET WORTH</b>	
<b>TOTAL ASSETS</b>		<b>TOTAL LIAB. AND NET WORTH</b>	

<b>PERSONAL INFORMATION</b>	
Are you a partner or officer in any other venture? If yes, list:	Do you have a will? _____ If so, name of executor:
	Are you a defendant in any suites or legal actions?
	Are you obligated to pay alimony, child support or separate maintenance payments? If so, describe:
	Are any assets pledged other than as described on schedules: If so, describe:
Have you ever declared bankruptcy? If so, describe:	

**Please Complete and Sign Second Page**

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## SCHEDULE B-NON-MARKETABLE SECURITIES

Number of Shares or Face Value (Bonds)	Description	In Name Of	Are These Pledged?	Source of Value	Value

## SCHEDULE C-PARTIAL INTERESTS IN REAL ESTATE EQUITIES

Address & Type Of Property	Title In Name Of	% Of Ownership	Date Acquired	Cost	Market Value	Mortgage Maturity	Mortgage Amount

## SCHEDULE D-REAL ESTATE OWNED

Address & Type Of Property	Title In Name Of	Date Acquired	Cost	Market Value	Mortgage Amount	Mortgage Payment

## SCHEDULE E-LIFE INSURANCE CARRIED, INCLUDING N.S.L.I. AND GROUP INSURANCE

Name of Insurance Company	Owner Of Policy	Beneficiary	Face Amount	Policy Loans	Cash Surrender Value

## SCHEDULE F-BANKS OR FINANCE COMPANIES WHERE CREDIT HAS BEEN OBTAINED

Name & Address Of Lender	Credit In The Name Of	Secured Or Unsecured?	Original Date	High Credit	Current Balance

The information contained in this statement is provided for the purpose of obtaining, or maintaining credit with you on behalf of the undersigned, or persons, firms or corporations in whose behalf the undersigned may either severally or jointly with others, execute a guaranty in your favor. Each undersigned understands that you are relying on the information provided herein (including the designation made as to ownership of property) in deciding to grant or continue credit. Each undersigned represents and warrants that the information provided is true and complete and that you may consider this statement as continuing to be true and correct until a written notice of a change is given to you by the undersigned. You are authorized to make all inquiries you deem necessary to verify the accuracy of the statements made herein, and to determine my/our creditworthiness. You are authorized to answer questions about your credit experience with me/us.

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

Signature (Individual) \_\_\_\_\_

S.S. No. \_\_\_\_\_ Date of Birth \_\_\_\_\_

Signature (Other Party) \_\_\_\_\_

S.S. No. \_\_\_\_\_ Date of Birth \_\_\_\_\_