



PERSONAL FINANCIAL STATEMENT

SECTION 1 - INDIVIDUAL INFORMATION

NAME:		BUSINESS NAME:	
ADDRESS:		BUSINESS ADDRESS:	
CITY:	STATE:	BUSINESS CITY:	STATE:
POSITION:		BUSINESS PHONE:	
LENGTH OF EMPLOYMENT:			

SECTION 2 - OTHER PARTY INFORMATION

NAME:		BUSINESS NAME:	
ADDRESS:		BUSINESS ADDRESS:	
CITY:	STATE:	BUSINESS CITY:	STATE:
POSITION:		BUSINESS PHONE:	
LENGTH OF EMPLOYMENT:			

SECTION 3 - STATEMENT OF FINANCIAL CONDITION AS OF:

ASSETS	IN DOLLARS	LIABILITIES	IN DOLLARS
CASH IN BANK:	\$	NOTES PAYABLE TO BANKS - SCHEDULE E:	\$
CASH IN OTHER BANKS:	\$	NOTES PAYABLE TO OTHER INSTITUTIONS - SCHEDULE E:	\$
MARKETABLE SECURITIES SCHEDULE A:	\$	DUE TO BROKERS:	\$
NON-MARKETABLE SECURITIES SCHEDULE B:	\$	AMOUNTS PAYABLE - SECURED:	\$
SECURITIES HELD IN MARGIN ACCOUNTS:	\$	AMOUNTS PAYABLE - UNSECURED:	\$
RESTRICTED CONTROL STOCKS (IRA, 401K):	\$	ACCOUNTS AND BILLS DUE:	\$
REAL ESTATE EQUITIES SCHEDULE C:	\$	UNPAID INCOME TAX:	\$
RECEIVABLES (REAL ESTATE ESCROW):	\$	OTHER UNPAID TAXES AND INTEREST:	\$
AUTOMOBILES:	\$	REAL ESTATE MORTGAGES SCHEDULES C & E:	\$
OTHER PERSONAL PROPERTY:	\$	OTHER DEBTS:	\$
LIFE INSURANCE CASH VALUE SCHEDULE D:	\$	AUTO LOAN:	\$
TOTAL ASSETS:	\$	CREDIT CARDS:	\$
		TOTAL LIABILITIES:	\$
		NET WORTH:	\$
		TOTAL LIABILITIES AND NET WORTH:	\$

SECTION 4 - ANNUAL INCOME

INCOME FOR YEAR:	\$	ANNUAL EXPENDITURES:	\$
SALARY, BONUSES, COMMISSIONS:	\$	MORTGAGE/RENTAL PAYMENTS:	\$
DIVIDENDS AND INTEREST:	\$	REAL ESTATE TAXES & ASSESSMENTS:	\$
REAL ESTATE INCOME:	\$	FEDERAL, STATE & LOCAL TAXES:	\$
OTHER	\$	INSURANCE PAYMENTS:	\$
	\$	INSTALLMENT PAYMENTS:	\$
	\$	OTHER	\$
	\$		\$
TOTAL INCOME:	\$		\$
		TOTAL EXPENDITURES:	\$

CONTINGENT LIABILITIES

ENDORSER, CO-MAKER OR GUARANTOR?
 INVOLVEMENT IN PENDING LEGAL ACTION?
 OTHER SPECIAL DEBT OR CIRCUMSTANCES?
 CONTESTED INCOME TAX LIENS?

SCHEDULE A - MARKETABLE SECURITIES

DESCRIPTION	# OF SHARES	IN NAME OF	PLEGDED?	VALUE
				TOTAL: \$

SCHEDULE B - NON-MARKETABLE SECURITIES

DESCRIPTION	% INTEREST	IN NAME OF	PLEGDED?	VALUE
				TOTAL: \$

SCHEDULE C - RESIDENCES AND OTHER REAL ESTATE EQUITIES

ADDRESS AND TYPE OF PROPERTY	MORTGAGE AMOUNT	IN NAME OF	MARKET VALUE	RE TAX	VALUE OF SHARE
TOTAL	\$		\$	\$	\$

SCHEDULE D - LIFE INSURANCE CARRIED, INCLUDING GROUP INSURANCE

INSURANCE COMPANY	OWNER OF POLICY	BENEFICIARY	ANNUAL PREMIUM	AMOUNT	CASH VALUE
TOTAL			\$	\$	\$

SCHEDULE E - BANK AND OTHER INSTITUTIONAL RELATIONSHIPS

INSTALLMENT CREDIT	SECURITY	DATE OF LOAN	MATURITY DATE	PAYMENT	AMOUNT OWED
				\$	\$
TOTAL					
SAVINGS ACCOUNTS	BALANCES		CHECKING ACCOUNTS	BALANCES	
TOTAL	\$			\$	
RETIREMENT ACCOUNTS	BALANCES				
TOTAL	\$				

The information contained in the statement is provided to induce you to extend or to continue the extension of credit to the undersigned or to others upon the guaranty of the undersigned. The undersigned acknowledge and understand that you are relying on the information provided herein in deciding to grant or continue credit or to accept a guaranty thereof. Each of the undersigned represents, warrants and certifies that the information provided herein is true, correct and complete. Each of the undersigned agrees to notify you immediately and in writing of any change in name, address, or employment and of any material adverse change (1) in any of the information contained in this statement or (2) in the financial condition of any of the undersigned or (3) in the ability of any of the undersigned to perform its (or their) obligations to you. In the absence of such notice or a new and full written statement, this should be considered as a continuing statement and substantially correct. You are authorized to make all inquiries you deem necessary to verify the accuracy of the information contained herein, and to determine the credit-worthiness of the undersigned. Each of the undersigned authorizes you to answer questions about your credit experience with the undersigned.

ELECTRONIC SIGNATURE

DATE OF BIRTH:

SOCIAL SECURITY NO:

PLEASE COMPLETE this form, **save it** and **email to** preynolds@cre360.com. Put "**CRE360 Financial Statement**" in subject line.